



# MONGOLIAN INTERNATIONAL TOURISM SURVEY 2005

## REPORT OF RESULTS

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## ABBREVIATION AND ACRONYMS

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Words used in text	Equivalent meaning
Aimag	Mongolian administrative unit similar to a province.
America, the US	The United States of America (USA)
Americans	Citizens of the United States of America (USA)
British	Residents of the UK
Business visitors	Visitors with the purpose of “Business / Conference / Professional”
Eastern Mongolia	The two Aimags of Dornod and Sukhbaatar
Incheon	Seoul’s international airport and home base of Korean Airlines
Korea	Republic of Korea, also referred to as South Korea
Leisure visitors	Visitors with the purpose of “Leisure / Recreation / Holiday”
MIAT	“Mongolian International Air Transport”, the national and state owned airline of Mongolia
N/A	“Not Available”, results of either the 1998 or 2002 survey did not include this category
Other EU	Countries that are part of the European Union, except Germany, France, UK and Italy. Switzerland was also included in this category, although technically not a member of the EU.
Services	Refers to the term “Service and Facilities” as used in the questionnaire
TACIS	“Technical Assistance to the Commonwealth of Independent States” TACIS funded the 1998 Mongolian visitor survey
TCI	“The Competitiveness Initiative”, funded the 2002 Mongolian visitor survey
UB	Ulaanbaatar, capital of Mongolia
UK	United Kingdom of Great Britain and Northern Ireland
US\$	United States Dollars, official currency of the US
USAID	The international development agency of the US government
VFR	Visitors with the purpose of visiting friends and relatives in Mongolia
Western Mongolia	The three Aimags of Bayan Ulgii, Khovd and Uvs
Western type visitors	Defined by Saffery A. and Sugar O. (2003) as residents of all European countries, the US and Canada as well as Australia and New Zealand.



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## INTRODUCTION

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### Acknowledgments

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H. Otgonjargal, the research project manager, had no doubt the most difficult and demanding job of assembling the team of researchers and overseeing the data collection phase at the airport. She and her team of researchers also had to bear being arrested on two occasions by over protective airport security guards. She was also responsible for the input of all the data into a SPSS format.

### Summary of results

#### Visitor profile

- By purpose of visit, the majority of visitors traveled to Mongolia for either leisure (68%) or business (17%), These 2 groups together are at 85% the majority of all visitors to Mongolia.
- Of all leisure visitors, the French (16%) were the largest visitor group. 77% of all leisure visitors originated from “western type countries” (Saffery A. and Sugar O., 2003) and 43% were from the European Union. 40% of all visitors were from countries where English is the official language.
- With 78%, Mongolia’s “Natural Scenery” is the biggest draw for leisure visitors, followed by “Mongolian Traditional Culture” with 60%.
- Compared with 1998 and 2002, more younger visitors were coming to Mongolia, 58% of all leisure visitors were under the age of 40 in 2005.
- While more than half (54%) of all business visitors had been to Mongolia on a previous occasion, only 14% of all leisure visitors had.
- Travel guidebooks (50%) are the most important source of information for all visitors, while the Internet has become the second most important source (43%).

#### Travel behavior patterns

- Nearly half (47%) of all leisure visitors traveled on package arrangements, while the vast majority of business visitors (93%) made their own arrangements.
- Just over half (55%) of all leisure visitors traveled only to Mongolia on their journey. Of the respondents who traveled to another country, 75% traveled to China, the most popular additional destination.
- The average duration of stay for leisure visitors was 14.8 nights, up by 1.9 nights from 2002. The French stayed the longest with 19 nights, the Japanese the shortest with 7.1 nights.
- A quarter of all visitors traveled to Karakorum, the most popular destination outside of UB, 22% to the Gobi and 17% to Terelj. Leisure visitors traveled to less areas in

Mongolia in 2005 (1.4 areas), compared with 2002 (1.8 areas) and 1998 (2.2 areas). With 2.4 places, Italians traveled most widely within Mongolia.

- Nearly half (46%) of all visitors to Mongolia were aware of the new Visitor Information Centers and 20% visited one. Of the latter, 80% went to the location at the post office, the most popular of all three centers. 66% of all respondents who visited one of the centers perceived the service either as “Excellent” or “Good”.
- 11.6 % of all respondents were target of a minor crime, 1.6% of a major one. The majority of all crime was committed in UB (92%), 36% thereof at the Narantuul Market, meaning 3% of overall visitors are target of a crime at this market.

#### Evaluation of visitor experience

- 87% of all visitors rated their stay in Mongolia as either “Excellent” or “Good”, while 77% stated that their visit fulfilled their expectations.
- For individual services and facilities, the greatest satisfaction was with “Service from Tour Operator” and “Guide Services”, the least with “Local Ground Transportation” and “Hotels”.
- Residents of the three Asian countries of Japan, Korea and China gave the most unfavorable ratings of individual services, while the US and UK gave the most favorable.
- 60% of all visitors said they were either “Very Likely” or “Likely” to return to Mongolia
- 76% of all visitors would recommend Mongolia for a holiday, topped by the French (89%) and the Italians (82%).

#### Visitor expenditure

- Visitors on individual arrangements spent an average of 44 US\$ per day, 674 US\$ for the entire duration of their stay and stayed for an average of 15 days. This is a drop from 2002 (60 US\$ per day, 832 US\$ per stay).
- The average price of a package tour was 2142 US\$, and visitors on this type of arrangement stayed for 14 days by average.
- Japanese (61 US\$ per day) and US (60 US\$ per day) visitors on individual arrangements were the highest per day spenders. Germans (931 US\$) and US (826 US\$) visitors on individual arrangements were the highest total spenders.
- Visitors on individual arrangement spent most money on accommodation (235 US\$, 32%), followed by restaurants (126 US\$, 17%)

#### Visitors' comments

- The overwhelming majority of visitors' best experiences were related to three fields: Contact with Mongolian people, exploring the natural environment and experiencing traditional Mongolian culture.
- Visitors' worst experiences were related to a number of areas: bad roads and travel conditions, taxi drivers, service standards and quality of accommodation, quality and variety of food, general hygienic standards, alcohol related incidents, crime and environmental issues.

- Visitor's were frustrated with communication barriers, their lack of knowledge of Mongolian and the small number of Mongolians who could communicate in their language. They also wished for more information sources on Mongolia.
- Visitor's were surprised by the stark contrast of UB and the countryside and how modern and developed UB was. The beauty of nature and friendliness of the Mongolian people in general also surprised many visitors.
- China was the one country that is competing with Mongolia for visitors' choice, 27% of respondents considered a visit there but choose Mongolia.
- Visitors choose Mongolia over other considered countries mainly for its natural environment. Other's said that work or business arrangements made the choice for them, or that they had friends and relatives who were living in Mongolia at the time.

### **Background of survey**

Two earlier visitors surveys have been conducted in Mongolia. In 1998, TACIS conducted an International Visitor Survey to study the profile and characteristics of international tourists visiting Mongolia, their travel behavior, expenditure patterns and general opinions. This was the first large scale international visitors survey in Mongolia.

In 2002, the Mongolian Tourism Association (MTA) with the support from The Competitiveness Initiative (TCI) conducted another survey, to measure trends from the 1998 survey and to seek new statistics to estimate the real contribution of tourism to the Mongolian economy. The 2002 survey resulted in the document titled "International Tourism Survey 2002, Report of Results" by Saffery A. and Sugar O. (2003) which was used for this report when comparing the 2005 survey with these two earlier surveys.

In 2005, Peter Weinig was commissioned by USAID/Chemonics International to undertake the Mongolian International Tourism Survey 2005. USAID wanted to measure trends from the two earlier surveys as well as collect new data on the profile and characteristics of international tourists visiting Mongolia.

### **Methodology**

#### **Questionnaire content and design**

The aim of the survey was to draw on as large a sample as possible. The most suitable way to achieve this was, considering the circumstances, to use a quantitative approach in a form of a self completing questionnaire (Veal 1992).

One of the two major objectives of this survey was to be able to compare the results with the earlier surveys of 1998 and 2002. In order to fulfill this objective, the questionnaire used in the survey had to be similar if not identical with the one used in the 2002 survey. The 2002 survey's questionnaire was used as a base but some changes were made. The wording of some questions was changed for better understanding. For some multiple choice questions, additional choices were added, for example "Fishing" in the question asking for the visitor's reason to come to Mongolia and "Eastern Mongolia" in the question asking which places respondents had visited. New questions were also added to get additional data on some issues, for example a question regarding the visitor's occupation was added. Two new sections were also added to the questionnaire, resulting from incidents in 2005. In the summer of 2005, there were some concerns that crime towards visitors was increasing in Mongolia. The 2002 results also commented on this and a section with three questions was asking respondents if they included, had experienced crime and the nature thereof while in Mongolia. Three new official visitor information centers opened in 2005 in Ulaan Baatar, all with involvement of USAID,

the principle sponsor of this survey. USAID was interested to gauge visitors' perception and usage of these centers and another section therefore included.

#### Method of application

The survey was conducted over 63 days at the departure lounge of the Buyant Ukhaa International Airport, Mongolia's main gateway. Once passengers had completed check in and immigration formalities and were sitting down before boarding their flights, they were approached by research assistant and asked to fill in a self completed questionnaire. Research assistants were on hand for any possible questions. For all flights there were at least three, up to five research assistance on duty, except the late Korean Air and early MIAT flight which was attended only by two. At least one of the research assistants spoke either Russian, Chinese or Japanese and all of them spoke reasonable English. Research assistants had been trained by the author in this report regarding the application of the questionnaire. The research project manager oversaw the application of the questionnaires on most days. Respondents were chosen randomly from the lounge departure.

#### Evaluation of data

4148 usable questionnaires were collected. All were coded by the research project manager using SPSS software. Results were calculated by the author using both SPSS and Excel software.

**Table 0-1. Comparison of the methodology of the 1998, 2002 and 2005 surveys**

	<b>TACIS 1998</b>	<b>MTA/TCI 2002</b>	<b>USAID 2005</b>
Duration	100 days from the 1 <sup>st</sup> of June to the 8 <sup>th</sup> September 1998	93 days from the 15 <sup>th</sup> of June to the 15 <sup>th</sup> of September	63 days from the 30 <sup>th</sup> of July to the 30 <sup>th</sup> of September
Sample	1506 usable questionnaires	3703 usable questionnaires	4148 usable questionnaires
Questionnaires	Were in English only	Were in English, Japanese, Korean, Chinese and Russian	Were in English, Japanese, and Russian

For all tables throughout this report, columns with the results from the 1998 survey were always shaded dark grey, 2002 light grey and 2005 left blank.

#### Mongolian spelling

The spelling of Mongolian place names was taken over from the 2002 survey. To date there is no official system to transcribe the Cyrillic Alphabet, Mongolia's official alphabet, using Latin script and there are various ways of spelling Mongolian words in the international literature. For example, Khuvsgul can also be found as Huvsgul, Khovsgol or Khoovsgol, all referring to the same lake in Northern Mongolia.

#### Comparison of results with the 1998 and 2002 surveys

Whenever possible, comparisons have been made with the results of the 1998 TACIS and 2002 TCI survey. All data used regarding those two surveys is taken from the Report of Results (Saffery A. and Sugar O., 2003) compiled after the 2002 survey. This data is not referenced again for convenience of reading. If other sources of information have been used, they are clearly referenced. The 1998 survey's questionnaire was not available. The 2005 questionnaire was drawn up using the 2002 one as a template to allow direct comparison. In certain instances, the 2005 questionnaire was different from the 2002 one, the reader is made aware of this on a case by case basis where it occurs.



The categorization for visitors to Mongolia has evolved and expanded since the 1998 survey to give a more complete and detailed picture of a certain visitor profiles. It was therefore not always possible to directly compare some data. For example, the 2002 survey did not include the nationality category of Italy and China. In 2005 these two nationalities have evolved to a recognizable group and therefore, have been included in the results. If results for some categories were not available from previous surveys, the acronym “N/A” has been used in tables in their place, meaning “Not Available”. Some categorizations have also changed, this is explained in more detail in the following section. For example, both the 1998 and 2002 surveys use “Western Europe” as a category, meaning all western European countries but France, Germany and the UK. This category has been replaced for the 2005 survey with “Other EU”, meaning all EU member states and Switzerland, but excluding France, Germany, the UK and Italy, which each have their own category.

Results show that out of the six possible purposes of visit (Leisure / Recreation / Holiday; Visiting Friends & Relatives; Business / Conference / Professional; Employment; Study and Other), the two most important one were “Leisure / Recreation / Holiday” (68% of all respondents) and “Business / Conference / Professional” (17% of all respondents), accounting for a total of 85% of all respondents. The evaluation of the data is concentrated on these two groups, while the other four groups, accounting only for 15% of all visitors, are evaluated mostly in brief to give a basic insight into the profile of these groups. Whenever results are split by nationality, the same order is used, starting with France and the US and ending with “Other World”. This order derives from the percentage of “Leisure / Recreation / Holiday”, the largest segment of all purposes of visit of all respondents, starting with France which accounts with 16% for the largest visitor segment by nationalities.

Throughout this report, United States Dollars (US\$) have been used as the currency. If respondents used another currency, it was converted into US\$ using an online currency converter (Expedia 2005) on the first November 2005.

### **Different categorisations of nationality in the three surveys**

To identify nationality, the 1998 survey used eight broad groups according to the country of residence: Asia, USA, Germany, France, UK, Other Western Europe, Eastern Europe and All Other Countries. Other Western Europe and Eastern Europe were not further defined.

The 2002 survey used nine major markets by country: Japan, Korea, North America, Australasia, UK, Germany, France, Other Western Europe and All Other Countries. North America included the USA and Canada, Australasia included the countries of Australia and New Zealand and “Other Western Europe” included Spain, Portugal, the Netherlands, Belgium, Andorra, Luxemburg, Sweden, Norway, Finland, Austria, Denmark, Switzerland, Italy, Liechtenstein, Malta, Cyprus and Greece.

The 2005 survey used eleven major markets by country: France, USA, UK, Japan, Germany, Italy, Korea, Australia, China, Other EU and Other World. “Other EU” included countries that are part of the European Union, except Germany, France, UK and Italy. Switzerland was also included in this category, although technically not a member of the EU. “Other World” included all countries not specifically mentioned in any other category.

In order to be able to make comparisons between the three surveys, results of the classification of country of market areas/nationality was compared with each other in the following table.

**Table 0-2. Comparison of market areas/nationality as used by the 1998, 2002 and 2005 surveys**

<b>1998</b>	<b>2002</b>	<b>2005</b>
USA	North America	USA
	Australasia	Australia
Other Western Europe	Other Western Europe	Other EU
All Other Countries	All Other Countries	Other World
Asia	Japan	Japan
	Korea	Korea
		China
UK	UK	UK
Germany	Germany	Germany
France	France	France
		Italy

In all tables throughout this report, columns with the results from the 1998 survey are shaded dark grey, 2002 light grey and 2005 left blank.

## SECTION I: VISITOR PROFILE

### 1.1. Country of residence and purpose of visit

*Question: What is your country of residence?*

*Question: What was your main purpose of visiting Mongolia?*

**Table 1-1. Country of residence of all visitors to Mongolia (%)**

France	USA	UK	Japan	Germany	Italy	Korea	Australia	China	Other EU	Other World
13	16	10	9	8	5	6	4	5	15	8

**Table 1-2. Comparison between country of residence of leisure visitors, 1998, 2002 and 2005 (%)**

Country of residence	1998	2002	2005
France	18	11	16
USA	31	18	14
UK	6	7	12
Japan	N/A	24	10
Germany	13	8	8
Italy	N/A	N/A	7
Korea	N/A	8	5
Australia	N/A	3	3
China	N/A	N/A	2
Other EU	24	14	17
Other World	7	7	6

The European Union is Mongolia's most important originating region for leisure visitors with 60% of all visitors originating from there. The three most important Asian countries, Japan, Korea and China account for 17% of all leisure visitors while the USA accounts for 14%. As a destination, Mongolia seems to appeal to visitors from "western type countries" (Saffery A. and Sugar O., 2003) where more than three quarter (77%) of all leisure visitors originate from. With 16%, the French stand out as the single biggest nationality of leisure visitors to Mongolia in 2005. 40% of all visitors are from countries where English is the official language making English the most important language for tourism in Mongolia.

The proportion of American visitors has declined since 1998 by 15%. Over the same period, visitors from the UK have doubled to 12% making them the third largest segment of leisure visitors. The proportion of Japanese and Korean visitors have declined by nearly half between 2002 and 2005.

**Table 1-3. Comparison between purpose of visit, 1998, 2002 and 2005 (%)**

Purpose of Visit	1998	2002	2005
Leisure / Recreation / Holiday	44	58	68
Visiting Friends & Relatives	11	8	7
Business / Conference / Professional	40	27	17
Employment	N/A	1	2
Study	N/A	1	2
Other	5	5	4

**Table 1-4. Comparison between purpose of visit, 1998, 2002 and 2005 (number of visitors)**

<b>Purpose of Visit</b>	<b>1998</b>	<b>2002</b>	<b>2005</b>
Leisure / Recreation / Holiday	59400	133480	234352
Visiting Friends & Relatives	14850	18411	24124
Business / Conference / Professional	54000	62137	58588
Employment	N/A	2301	6893
Study	N/A	2301	6893
Other	6750	11507	13785
<b>TOTAL NUMBER OF VISITORS</b>	<b>135000</b>	<b>230138</b>	<b>344635</b>

To be able to demonstrate possible trends, not by percentages but by the actual number of visitors, visitor numbers to Mongolia from the Mongolian Statistics Office (Yu and Goulden 2005) were used. The total number of visitors for the years 1998, 2002 and 2004 have been compiled from Yu and Goulden (2005) who compiled their numbers from the 1999 TACIS report and the Mongolian Ministry of Road, Transportation and Tourism 2004 statistics.

When studying visitors' purpose of visit, the key trend is that the proportion of leisure visitors has risen from 44% in 1998 to 68% in 2005 while at the same time the proportion of business visitors has declined by more than half (1999: 40%, 2005: 17%). If the overall number of visitors to Mongolia are categorized by their purpose of visit using official figures (Yu and Goulden, 2005), the importance of leisure visitors have for Mongolia becomes apparent. While the total number of business visitors only slightly increased from 1998 (54000) to 2005 (58588), the number of leisure visitors nearly quadrupled (1998: 59400, 2005: 234352).

**Table 1-5. Breakdown of purpose of visit and market area (%)**

<b>Country of residence</b>	<b>Leisure/ Recreation/ Holiday</b>	<b>Visiting Friends &amp; Relatives</b>	<b>Business/ Conference/ Professional</b>	<b>Employment</b>	<b>Study</b>	<b>Other</b>
France	87	3	5	1	1	3
USA	61	8	19	1	4	6
UK	83	6	6	1	1	2
Japan	73	7	12	1	5	1
Germany	64	9	17	1	4	5
Italy	85	2	10	0	0	2
Korea	61	13	13	1	1	11
Australia	49	7	37	5	1	1
China	33	7	51	6	2	2
Other EU	76	7	11	1	2	3
Other World	49	5	37	3	2	5

France (87%), Italy (85%) and the UK (85%) have a significant higher than average (68%) proportion of leisure visitors. Nearly half of all Chinese visitors (51%) and more than a third of Australians (37%) come to Mongolia for business reasons. China is Mongolia's largest trading partner, accounting in 2004 for 47.8 % of exports and 23.6 % of imports (CIA Factbook 2005), while a large number of Australians are working in the expanding Mongolian mining sector. 13% of all Koreans come to Mongolia to visit friends and relatives which is nearly double the average (7%).

## 1.2. Reason for Leisure Visitors to choose Mongolia

*Question: What was your main reason for visiting Mongolia? Multiple answers allowed.*

**Table 1-6. Comparison between reason for leisure visitors choosing Mongolia 1998, 2002 and 2005 (%)**

Reasons of visiting Mongolia	1998	2002	2005
Natural Scenery	66	69	78
Wildlife Watching	31	25	23
Mongolian Traditional Culture	51	46	60
Mongolian History/Chingis Khan	27	21	21
Adventure Tours	24	26	32
Fishing	N/A	N/A	3
Hunting	2	1	1
Special Interest Tour	10	9	1
Other	12	12	1

“Natural Scenery” (78%) and Mongolian Traditional Culture (60%) are the biggest attractions for leisure visitors to Mongolia and respondents who stated them as their main reasons for visiting Mongolia have mostly increased over the years. Adventure tours (32%) have become the third most important reason why visitors are coming to Mongolia.

Unlike the two earlier surveys, in the 2005 survey, “Adventure Tours” were further labeled by including “Riding, Biking and Hiking”. In both the 1998 and 2002 survey this additional explanation was omitted. It is reasonable to conclude that many respondents who were on riding, biking or trekking itineraries in 1998 and 2002 ticked the “Special Interest Tour” option. This and the fact that the “Fishing” option was also not available in 1998 and 2002 and was covered with the “Special Interest Tour” option could explain the steep drop in the categories of “Special Interest Tours” and “Other”.

Some examples for respondents, who ticked the “Other” option, are: “Mongolian Rally” (8 respondents), “Visit Churches” (3 respondents) “Trans Siberian Railway”, “Buddhism”, “Adoption” and “Felt Making” (each 2 respondents) and “Visit the Homeland of Yokuzana” (1 respondent).

**Table 1-7. Leisure visitors reason for choosing Mongolia by market area (%)**

Reason	France	USA	UK	Japan	Germany	Italy	Korea	Australia	China	Other EU	Other World
Natural Scenery	84	68	67	75	89	88	68	71	86	82	76
Wildlife Watching	30	19	16	24	20	20	26	18	28	22	21
Mongolian Traditional Culture	68	68	61	43	75	65	34	73	45	62	56
Mongolian History / Chingis Khan	17	30	20	11	26	19	20	43	19	20	28
Adventure Tours	36	29	48	28	28	22	25	21	28	28	35
Fishing	1	6	2	2	5	3	1	1	3	3	5
Hunting	1	3	0	0	0	0	0	0	0	1	0
Special Interest Tour	0	3	3	1	0	0	2	3	0	0	3
Other	0	2	2	1	1	0	1	4	0	0	1

Visitors from the three Asian countries of Japan, Korea and China have the least interest of all visitors in “Mongolian traditional culture”, significantly below the average of 60%. The Japanese (11%) have a low, about half the average rating of “Mongolian History/Chinggis Khan”. British visitors stick out as rating “Adventure Tours” significantly higher than average, “Fishing” is rated the highest by US and German visitors and “Hunting” mainly appeals to US visitors but also to a small number of French and other EU visitors.

### 1.3. Gender and age

*Question: What is your gender?*

*Question: To which age group do you belong?*

**Table 1-8. Gender by purpose of visit (%)**

Gender	Leisure / Recreation / Holiday	Visiting Friends & Relatives	Business / Conference / Professional	Employment	Study	Other
Male	56	61	81	80	61	57
Female	44	37	18	20	38	43

With 81% and 80% respectively, the majority of business and employment visitors are males while leisure visitors are spread more evenly with just slightly more male (56%) than female (44%) visitors. In the 2002 survey, the gender distribution for leisure visitors is identical to this survey.

**Table 1-9. Gender by market area of Leisure / Recreation / Holiday visitors (%)**

Gender	France	USA	UK	Japan	Germany	Italy	Korea	Australia	China	Other EU	Other World
Male	54	58	55	54	53	63	65	42	67	52	56
Female	46	42	43	45	47	36	32	55	32	47	44

Italy (63%), Korea (65%) and China (67%) have a higher than average male proportion of leisure visitors.

**Table 1-10. Comparison between age for leisure visitors 1998, 2002 and 2005(%)**

Age	1998	2002	2005
15-19	2	4	7
20-29	17	18	26
30-39	23	16	25
40-49	25	20	18
50-59	23	19	14
60 & above	10	13	10

All three surveys did not ask for the exact age of the respondents but suggested an age range. Therefore it is not possible to determine a valid average of age. However, by using a mean age, e.g. 24.5 for the 20-29 category, an average age can be calculated but has to be used with caution, as it is not proven as absolute statistically correct. With this method, mean age in 1998 was 43 years and in both 2002 and 2005 it was 39. While the mean age has not changed between 2002 and 2005, there is a much higher proportion of younger people coming to Mongolia in 2005 than in 1998 and 2002, confirming the findings of the 2002 survey that stated that “the average tourist to Mongolia is getting younger” (Saffery A. and Sugar O., 2003, p16).

**Table 1-11. Age by market area of Leisure / Recreation / Holiday visitors (%)**

Age	France	USA	UK	Japan	Germany	Italy	Korea	Australia	China	Other EU	Other World
15-19	4	5	26	5	3	3	9	2	6	4	6
20-29	37	16	25	36	25	18	38	18	20	25	23
30-39	25	15	17	30	22	37	28	28	39	25	24
40-49	14	16	15	14	18	22	16	17	17	22	22
50-59	16	20	10	8	15	14	5	20	14	15	14
60 and above	4	28	7	7	17	6	4	14	5	10	10

British visitors to Mongolia are the youngest, with nearly a quarter (26%) being under 20 and more than half (51%) are below 30. The US tops the “60 and above” category, with 28%, which is three times the average.

**Table 1-12. Age by purpose of visit (%)**

Age	Leisure / Recreation / Holiday	Visiting Friends & Relatives	Business / Conference / Professional	Employment	Study	Other
15-19	7	8	1	3	5	15
20-29	26	27	15	20	50	38
30-39	25	22	25	25	20	16
40-49	18	19	27	30	12	14
50-59	14	15	21	17	5	6
60 and above	10	10	12	6	8	12

#### 1.4. Repeat visits

*Question: Have you visited Mongolia before?*

**Table 1-13. Comparison between repeat visits of all visitors 1998, 2002 and 2005 (%)**

No. of Visits	1998	2002	2005
First Visit	72	72	79
Repeat Visit	28	28	21

While in between 1998 and 2002 the percentage of first and repeat visitors stayed the same, in 2005 there is a higher proportion (79%) of first visitors compared with previous surveys

**Table 1-14. Comparison between repeat visits by purpose of visit 2002 and 2005 (%)**

No. of Visits		Leisure / Recreation / Holiday	Visiting Friends & Relatives	Business / Conference / Professional	Employment	Study	Other
First Visit	2002	89	63	50	49	68	75
	2005	86	67	46	50	82	70
Previous Visit	2002	11	37	50	51	32	25
	2005	14	33	54	50	18	30

In 2005, more than half of all business visitors had visited Mongolia on a previous occasion, while only 14% of all leisure visitors had been to Mongolia on a previous occasion. For all categories the proportion of first and previous visits did not change between 2002 and 2005 apart from student visitors which showed a decline in repeat visits.



**Table 1-15. Repeat visits by market area of Leisure / Recreation / Holiday visitors (%)**

No. of Visits	France	USA	UK	Japan	Germany	Italy	Korea	Australia	China	Other EU	Other World
First visit	94	87	97	82	84	97	87	88	85	89	84
Previous Visit	6	13	3	18	16	3	13	12	15	11	16

For leisure visitors, Japan has the highest proportion of repeat visitors (18%), followed by Germany (16%) and China (15%).

### 1.5. Sources of information

*Question: What were your main sources of information? Multiple answers allowed.*

**Table 1-16. Comparison between sources of information for all visitors 2002 and 2005 (%)**

Sources of Information	2002	2005
Friends / Relatives	36	38
Previous Visits	10	11
Travel Agent / Tour Operator	18	21
Internet Information	34	43
TV / Radio / Newspaper	11	12
Travel Guidebooks	39	50
Specialist Magazine	7	5
Other	5	1

Half of all visitors to Mongolia use travel guide books as their main source of information, an increase of 11% from 2002. The other important trend is that more visitors used the internet to get information on Mongolia (43%) in 2005 than in 2003 (34%), making the internet the second most important information source. This is followed by friends and relatives with 38%. Since most other information sources did not change significantly it can be concluded that visitors in 2005 used more diverse information sources than in 2002.

**Table 1-17. Sources of information by market area for all visitors (%)**

Sources	France	USA	UK	Japan	Germany	Italy	Korea	Australia	China	Other EU	Other World
Friends / Relatives	35	44	30	36	46	30	38	34	51	36	41
Previous Visits	5	15	8	8	12	7	11	20	16	9	18
Travel Agent / Tour Operator	26	23	27	25	17	15	15	18	14	21	18
Internet Information	49	42	40	40	41	57	45	50	29	45	42
TV / Radio / Newspaper	21	5	9	6	19	12	10	5	15	13	12
Travel Guidebooks	55	45	65	40	59	55	22	50	18	55	34
Specialist Magazine	9	3	2	3	8	10	1	1	3	8	4
Other	1	1	1	1	1	2	1	3	3	1	1

Relatively little use is made by Korean (22%) and Chinese (18%) visitors of guide books as source of information, while “Specialist Magazines” are used more than average by Italians (with 10% double the average) and French (9%).



**Table 1-18. Sources of Information by purpose of visit (%)**

Sources of Information	Leisure / Recreation / Holiday	Visiting Friends & Relatives	Business / Conference / Professional	Employment	Study	Other
Friends / Relatives	33	80	42	29	37	49
Previous Visits	5	15	32	20	11	15
Travel Agent / Tour Operator	27	7	8	2	9	13
Internet Information	46	26	42	42	33	31
TV / Radio / Newspaper	13	7	10	14	11	10
Travel Guidebooks	54	24	30	39	46	27
Specialist Magazine	6	2	3	3	11	4
Other	1	1	3	5	1	6

When comparing the sources of information for leisure and business visitors, the main differences are that 25% less business than leisure visitors use guidebooks. On the other hand, 32% draw information from previous visits which are 27% more than leisure visitors.

**Table 1-19. Comparison of sources of information, Leisure / Recreation / Holiday visitors between 1998, 2002 and 2005 (%)**

	1998	2002	2005
Friends / Relatives	32	35	33
Previous Visits	7	7	5
Travel Agent / Tour Operator	32	27	27
Internet Information	19	40	46
TV / Radio / Newspaper	11	14	13
Travel Guidebooks	57	51	54
Specialist Magazine	11	9	6
Other	13	5	1

The general trend of all visitors is reflected with similar trends for leisure visitors. Guide books have been the most important source of information since 1998. In 2005 more than half of all visitors (54%) used guidebooks as the main source of information, followed by 46% using the internet which has more than doubled (by 27%) from 1998 (19%). "Friends and Relatives" and "Travel Agent/Tour Operator" are the third and forth most important information source in 2005, with relatives numbers having only change slightly since 1998.

## 1.6. Occupation

*Question: What is your current occupation?*

Visitors were asked with an open ended question what their current occupation was. This was then classified into the 11 categories used in the two following tables. This question was not included in either the 1998 nor the 2002 survey so a comparison is not possible.

**Table 1-20. Current occupation, all visitors, leisure and business visitors (%)**

Occupation	Leisure / Recreation / Holiday	Business / Conference / Professional	All Visitors
Education/Teaching	17	14	16
Manager/Director	12	28	14
Government Employee	2	3	2
Engineer/Technical	9	17	11
Medical/Health	7	4	6
Media/IT	7	6	7
Student	18	3	18
Tourism	2	1	2
Financial/Legal	8	10	8
Administration/Salaried worker	9	6	8
Others	9	8	9

When comparing the occupation of business and leisure visitors, some results stick out. Business visitors have a much higher percentage of “Manager/Director” (28%) and “Engineer/Technical” (17%) than leisure visitors (12% and 9% respectively). Nearly no business visitors are students (3%), but 18% of leisure visitors are.

**Table 1-21. Current occupation, all visitors by market area (%)**

Service	France	USA	UK	Japan	Germany	Italy	Korea	Australia	China	Other EU	Other World
Education/Teaching	18	13	16	21	21	8	20	17	10	18	13
Manager/Director	15	13	13	6	13	15	8	13	32	14	23
Government Employee	2	2	1	3	2	2	1	3	5	2	3
Engineer/Technical	17	11	7	9	10	8	5	19	13	8	13
Medical/Health	8	6	3	5	6	11	5	9	1	6	4
Media/IT	8	5	7	5	7	8	7	9	6	8	5
Student	14	18	33	19	21	9	39	2	9	14	10
Tourism	1	2	1	1	0	1	0	3	2	3	3
Financial/Legal	9	9	8	6	3	13	6	7	14	8	9
Administration/Salaried worker	4	4	5	21	5	19	6	5	6	10	7
Others	5	18	6	4	11	5	3	12	4	9	9

Italy (8%) has a lower than average (16%) proportion of “Education/Teaching”. Japan (6%) and Korea (8%) have a lower than average (16%) proportion of “Manager/Director”, while for China (32%) this is higher than average. French (17%) and Australians (19%) lead the “Engineer/Technical” sector. More than a third (39%) of Koreans are students, as are a third (33%) of all British visitors.

## SECTION II: TRAVEL BEHAVIOR PATTERNS

### 2.1. Travel arrangements

*Question: Are you traveling on a package tour or did you make your own travel arrangements?*

**Table 2-1. Comparison of travel arrangements, all visitors 1998, 2002 and 2005 (%)**

Travel Arrangement	1998	2002	2005
Package Tour	23	37	34
Own Arrangements - with Prepayment	11	9	12
Own Arrangements - no Prepayment	66	54	54

**Table 2-2. Comparison of travel arrangements, leisure visitors, 1998, 2002 and 2005 (%)**

Travel Arrangement	1998	2002	2005
Package Tour	53	54	47
Own Arrangements - with Prepayment	12	10	10
Own Arrangements - no Prepayment	35	36	43

Slightly less than half (47%) of all leisure visitors to Mongolia travelled on a package tour. This is less (7%) than in 2002. The proportion of visitors who made their own arrangements but prepaid for some services stayed fairly constant from 1998 (12%) to 2002 and 2005 (both 10%).

**Table 2-3. Travel arrangements by market area for leisure visitors (%)**

Travel Arrangement	France	USA	UK	Japan	Germany	Italy	Korea	Australia	China	Other EU	Other World
Package Tour	49	49	47	48	44	54	34	46	24	48	38
Own Arrangements - with Prepayment	9	9	16	12	8	9	10	8	9	9	12
Own Arrangements - no Prepayment	42	42	37	40	47	37	55	46	67	43	50

Only about a quarter (24%) of all Chinese leisure visitors and a third (34%) of Korean leisure visitors travel on package tours, while all other nationalities follow the general trend. The UK (16%) has a considerably higher than average (10%) proportion of visitors that make their own travel arrangements with prepayment for some services.

**Table 2-4. Travel arrangements by purpose of visit (%)**

Travel Arrangement	Leisure / Recreation / Holiday	Visiting Friends & Relatives	Business / Conference / Professional	Employment	Study	Other
Package Tour	47	4	7	7	20	13
Own Arrangements - with Prepayment	10	15	10	11	16	20
Own Arrangements - no Prepayment	43	81	83	82	64	67

Apart from leisure visitors, the majority of all other visitors make their own arrangement for visiting Mongolia. Some 20% of students say that they are on package tours while a further 16% prepay for some services, possibly perceiving organized educational exchanges as package tours.

## 2.2. Single and multi destination travel

*Question: Apart from Mongolia, are you visiting other countries on this trip?*

**Table 2-5. Comparison of Single and Multi destination travel for leisure visitors 1998, 2002 and 2005 (%)**

	1998	2002	2005
Mongolia only	56	57	55
Multi destination	44	43	45

If multi destination, countries visited

China	80	63	75
Russia	16	25	27
Korea	N/A	N/A	6
Other Asia	19	31	21
Other World	12	19	6

The proportion of leisure visitors that travel to Mongolia only, has not significantly changed from the 1998 and 2002 surveys. Three quarters of all multi destination travelers visit China.

**Table 2-6. Single and multi destination travel by market area for leisure travelers (%)**

	France	USA	UK	Japan	Germany	Italy	Korea	Australia	China	Other EU	Other World
Mongolia only	67	34	30	80	68	69	78	32	84	52	39
Multi destination	33	66	70	20	32	31	22	68	16	48	60

If multi destination, countries visited (%)

China	68	81	80	71	61	79	41	77	--	75	80
Russia	33	21	22	6	49	31	59	9	30	37	15
Korea	0	10	1	18	7	0	--	11	0	6	6
Other Asia	18	25	20	21	4	4	30	48	40	12	32
Other World	4	4	4	18	1	0	30	11	10	4	6
Average number of countries	1.2	1.4	1.3	1.3	1.2	1.1	1.6	1.6	0.8	1.3	1.4

There are significant differences between single and multi destination travel for different countries of residence. UK (70%), Australian (68%) and US (66%) leisure visitors have a high proportion of multi destination travel, while China (16%), Japan (20%) and Korea (22%) tend to travel to Mongolia only. All three latter Asian countries have direct air links to Mongolia. Italy (31%), Germany (32%) and France (33%) have a lower than average proportion of multi destination visitors.

Of the visitors who visit another country apart from Mongolia, Koreans (59%) and Germans (49%) have the highest proportion of visits to Russia, while Japanese (18%), Australians (11%) and Americans (10%) have a higher than average proportions of visiting Korea together with Mongolia. Korean Airlines has daily flights between Ulaanbaatar and Seoul/Incheon from where it connects to 15 Japanese airports (Korean Air 2005) while at the same time there are only 3 weekly direct flights between UB and Tokyo and one to Osaka. (MIAT 2005). This survey also recorded which flight respondents were taking and there was a high proportion of Japanese visitors on Korean Airline flights. There are no direct air links from the US and Australia to Mongolia and there is evidence that many Americans and

Australians transit through Korea on their way to and from Mongolia. If on a multi destination holiday, Korean and Australians are most widely traveled with an average of 1.6 other countries visited, while Chinese (0.8) and Italians (1.1) visit the least other countries.

**Table 2-7. Comparison of single and multi destination travel by market area for leisure travelers 1998, 2002 and 2005 (%)**

	Year	France	USA	UK	Japan	Germany	Italy	Korea	Australia	China	Other EU	Other World
Single	1998	70	N/A	62	N/A	72	N/A	N/A	N/A	N/A	N/A	N/A
	2002	70	30	31	85	68	N/A	61	40	N/A	48	59
	2005	67	34	30	80	68	69	78	32	84	52	39
Multi	1998	30	N/A	38	N/A	28	N/A	N/A	N/A	N/A	N/A	N/A
	2002	30	70	69	15	32	N/A	39	60	N/A	52	41
	2005	33	66	70	20	32	31	22	68	16	48	60
China	2002	60	73	82	39	57	N/A	14	55	N/A	63	61
	2005	68	81	80	71	61	79	41	77	-	75	80
Russia	2002	34	13	13	11	35	N/A	11	8	N/A	32	13
	2005	33	21	22	6	49	31	59	9	30	37	15

No data was available on the additional countries visited for the 1998 survey. In the 2002 survey, there was a different split of the additional countries visited apart from Russia and China so only these two countries are included in the comparison with the 2005 survey. When comparing the different market areas for single destination travel, the only trend is that 17% more Koreans are opting for single destination travel in 2005 than in 2002.

Of the visitors who opt for multi destination travel the proportion who are visiting China in addition to Mongolia has increased for all nationalities apart from the UK. 32% more Japanese, 27% more Koreans and 22% more Australians visited China, if on a multi destination visit in 2005 compared with 2002. Russia has also gained in popularity in 2005 compared to 2002 with 48% more Koreans and 14% more Germans visiting it.

**Table 2-8. Single and Multi destination travel by market area for all visitors (%)**

	France	USA	UK	Japan	Germany	Italy	Korea	Australia	China	Other EU	Other World
Mongolia only	68	40	35	81	68	67	77	36	90	55	46
Multi destination	32	60	65	19	32	33	22	64	10	45	54

**Table 2-9. Single and multi destination travel by purpose of visit (%)**

	Leisure / Recreation / Holiday	Visiting Friends & Relatives	Business / Conference / Professional	Employment	Study	Other
Multi Travel	45	34	37	27	27	36
Mongolia Only	55	66	63	73	73	64

If multi destination, countries visited

	Leisure / Recreation / Holiday	Visiting Friends & Relatives	Business / Conference / Professional	Employment	Study	Other
China	75	76	70	77	85	71
Russia	27	10	10	0	23	12
Korea	6	9	10	18	0	10
Other Asia	21	35	40	35	23	39
Other World	6	18	12	6	0	14

When split by purpose of visit, leisure visitors (45%) had the highest proportion of multi destination travel while all other visitors mostly visited only Mongolia, with “Study” and “Employment” (both 73%) having the highest proportion of single destination travelers.

## 2.3. Length of stay

*Question: How many nights did you spend in Mongolia?*

**Table 2-10. Length of stay by market area for leisure visitors (%)**

Length of Stay	France	USA	UK	Japan	Germany	Italy	Korea	Australia	China	Other EU	Other World
1-3 Nights	2	4	2	5	4	1	16	10	17	7	15
4-7 Nights	5	32	9	69	7	5	46	17	43	18	18
8-14 Nights	23	33	31	22	21	27	26	18	20	23	35
15-21 Nights	44	17	24	2	42	48	10	30	15	30	23
22 or More Nights	26	14	34	2	26	20	3	24	5	22	9
Mean Number of Nights	19.0	13.6	18.6	7.1	18.4	16.9	8.1	15.4	8.5	16.0	12

Respondents stated how many nights they spent in Mongolia from which a “Mean Number of Nights” could be calculated. The scaling of nights was only introduced after the survey was completed.

“Western type visitors” (Saffery A. and Sugar O., 2003) stay the most nights in Mongolia, topped by France with 19 nights, the UK with 18.6 and Germany with 18.4 nights. The shortest stay is recorded for visitors from the 3 main Asian countries with Japanese staying the shortest (7.1. nights). The UK (34%) has a high proportion of visitors that are staying longer than 22 nights.

**Table 2-11. Comparison of Mean Number of Nights for leisure visitors 2002 and 2005 (nights)**

Length of Stay	France	USA	UK	Japan	Germany	Italy	Korea	Australia	China	Other EU	Other World
Mean Number of Nights 1998	17.9	N/A	15.4	N/A	14.6	N/A	N/A	N/A	N/A	N/A	N/A
Mean Number of Nights 2002	17.1	15.1	18.2	8.3	15.3	N/A	9.7	17.5	N/A	15.5	12

Mean Number of Nights 2005	19	13.6	18.6	7.1	18.4	16.9	8.1	15.4	8.5	16	12
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Germans were staying 3.1 nights longer in 2005 than in 2002 and 3.8 nights longer than 1998. The British are also staying longer in 2005 than in 2002 and 1998, although only by 0.4 nights. The French reversed their trend of staying shorter in the 1998 to the 2002 survey and are staying longer in 2005 by nearly two nights compared with 2002. All other market areas reduced their stay, led by the Australians with 2.1 and the Koreans with 1.6 nights.

**Table 2-12. Comparison of length of stay for leisure visitors 1998, 2002 and 2005 (%)**

Length of Stay	1998	2002	2005
1-3 Nights	7	4	6
4-7 Nights	27	25	22
8-14 Nights	30	36	26
15-21 Nights	17	17	27
22 or More Nights	19	18	19
Mean Number of Nights	14.9	12.9	14.8

While leisure visitors in the 8-14 night bracket decreased by 10%, there is no other significant trend between 1998, 2002 and 2005.

**Table 2-13. Length of stay by purpose of visit**

Length of Stay	Leisure / Recreation / Holiday	Visiting Friends & Relatives	Business / Conference / Professional	Employment	Study	Other
1-3 Nights	6	6	20	11	8	5
4-7 Nights	22	28	36	17	6	20
8-14 Nights	26	31	22	17	25	26
15-21 Nights	27	18	7	4	18	17
22 or More Nights	18	17	16	51	43	33
Mean number Of Nights	14.8	14.8	14.3	33.5	24.2	20.6

Visitors who came either for employment reasons (33.5 nights) or study (24.2 nights) stay the longest, while leisure and VFR visitors stay the shortest with 14.8 nights by average.

## 2.4. Places visited and distribution of tourist nights

*Question: Which of the following places, national parks and attractions did you visit while in Mongolia? And how many nights did you spend in each place?*

Respondents were given a list of places and asked to state the number of nights they had stayed at each place. Multiple answers were allowed. The list of places was carried over from the 2002 survey to allow comparison, but the category of “Eastern Mongolia”, was added and further defined as comprising of the two Aimags of Dornod and Sukhbaatar. In the 1998 survey, neither “Eastern Mongolia” nor Bayan Ulgi/Khovd/Uvs was available, instead the category “other places” was used. The geographical size of the listed places varies. Karakorum refers to one town, the town of Karakorum comprising of Erdene Zuu, Mongolia’s largest monastery. In a common tourism view, Terelj refers to part of Gorki – Terelj National Park, namely the area between the park entrance at the bridge over the Tuul river and Terelj village, in which most of the ger camps are located. Khuvsgul refers to both, the Aimag and the national park of the same name where Lake Khuvsgul is situated. Arkhangai, composed



of such attractions as Tsetserleg, Tsenkher Hot Springs, the gorge of the Chulut river and Tekhiin Tsagaan Nuur lake and national park. Eastern Mongolia refers to the two Aimags of Dornod and Sukhbaatar, while Gobi refers to the Mongolian part of the Gobi desert, comprising of the Aimags of Dundgov, Gov-Altai and Omnogov. The survey also showed that all visitors to Mongolia stayed at least one night in Mongolia

**Table 2-14. Comparison of places visited, all visitors, 2002 and 2005 (%)**

Places visited	2002	2005
Khentii	6	5
Terelj	36	17
Khuvsgul	16	15
Bayan Ulgii / Khovd / Uvs	8	8
Karakorum	31	25
Eastern Mongolia	N/A	3
Gobi	30	22
Arkhangai / Tekhiin Tsagaan Nuur	16	16
Average number of places visited	1.4	1.1

There is a drop in the proportion of visitors visiting Karakorum (by 6%), the Gobi (by 8%), and Terelj (by 19%) while all other locations have remained near static in 2005 compared with 2002. 24% of all visitors to Mongolia only visited to capital Ulaanbaatar. Visitors are also less likely to travel to multiple places within, Mongolia. By average, they only visit one place (1.1) outside Ulaanbaatar.

**Table 2-15. Places visited by market area, leisure visitors (%)**

Places visited	France	USA	UK	Japan	Germany	Italy	Korea	Australia	China	Other EU	Other World
Khentii	5	6	7	3	6	5	1	6	3	7	4
Terelj	11	13	11	25	24	25	33	11	23	20	27
Khuvsgul	30	14	21	3	16	33	18	21	6	22	21
Bayan Ulgii / Khovd / Uvs	9	9	15	4	11	12	7	8	8	15	11
Karakorum	48	21	29	18	42	63	13	17	8	40	25
Eastern Mongolia	3	4	3	2	4	6	4	4	0	4	3
Gobi	26	28	29	14	36	53	17	30	11	35	19
Arkhangai / Tekhiin Tsagaan Nuur	40	10	18	2	21	43	8	13	5	25	19
Average number of places visited	1.7	1.1	1.3	0.7	1.6	2.4	1.0	1.1	0.6	1.7	1.3

Italians (2.4%), French (1.7%) and Germans (1.6%) are the most widely traveled visitors to Mongolia. Chinese (0.6), Japanese (0.7) and Koreans (1.0) visit the least number of places outside of Ulaanbaatar. Terelj is most popular with Korean visitors (33%), while Khuvsgul and Arkhangai is with the Italians (33% and 43%) and the French (30% and 49%). Over half of all Italian visitors (53%) travel to the Gobi and nearly two thirds to Karakorum, which also sees nearly half of all French (48%) visitors going there.



**Table 2-16. Comparison of places visited by leisure visitors 1998, 2002 and 2005 (%)**

Places visited	1998	2002	2005
Khentii	4	8	5
Terelj	32	39	19
Khuvsgul	22	23	20
Bayan Ulgii / Khovd / Uvs	N/A	8	10
Karakorum	56	45	33
Eastern Mongolia	N/A	N/A	3
Gobi	53	40	29
Arkhangai / Tekhiin Tsagaan Nuur	17	23	21
Average number of places visited	2.2	1.8	1.4

The most popular places to visit outside UB are Karakorum, where nearly a third of all visitors to Mongolia ventures (33%), the Gobi (29%) and Khuvsgul (20%). The trend that leisure visitors visit less areas outside the capital Ulaanbaatar per stay is continuing, in 2005 they were only visiting 1.4 places by average. While Terelj was the most popular place to be visited in 2002 (39%), in 2005 it is only ranked 4<sup>th</sup> (19%). There is a big drop in the proportion of visitors to Terelj (by 20%), to Karakorum (by 12%) and to the Gobi (by 11%). This however has be to seen in relation with the overall increase of total visitor numbers to Mongolia as outlined in Table 1.4. While the proportion of overall visitors to certain areas might have dropped, the overall visitor numbers a certain destination receives are overall still increasing. 14% of all leisure visitors to Mongolia visited only the capital Ulaanbaatar during their stay and did not venture to the countryside.

**Table 2-17. Places visited by purpose of visit (%)**

Areas Visited	Leisure / Recreation / Holiday	Visiting Friends & Relatives	Business / Conference / Professional	Employment	Study	Other
Khentii	5	3	3	4	10	6
Terelj	19	17	9	10	16	13
Khuvsgul	20	9	2	6	10	4
Bayan Ulgii / Khovd / Uvs	10	4	3	1	8	1
Karakorum	33	12	5	1	18	10
Eastern Mongolia	3	2	2	0	3	3
Gobi	29	10	8	9	17	8
Arkhangai / Tekhiin Tsagaan Nuur	21	10	4	3	13	5
Average Number of Places Visited	1.4	0.7	0.4	0.3	1.0	0.5

Leisure visitors visit by average the most places outside UB (1.4 other places), only a few business visitors venture outside UB (0.4 other places).

**Table 2-18. Average length of stay in nights, leisure visitors (nights)**

Areas visited	Nights
Khentii	4
Terelj	2
Khuvsgul	5
Bayan Ulgii / Khovd / Uvs	6
Karakorum	2
Eastern Mongolia	4
Gobi	4
Arkhangai / Tekhiin Tsagaan Nuur	5

The longest average stay of leisure visitors is in West Mongolia with 6 nights. Ulgii, the capital of Bayan Ulgii Aimag and gateway to the west of Mongolia is geographically furthest away from Ulaanbaatar from where a plane journey takes a minimum of 4 hours. The shortest stay is in Terelj and Karakorum, both small geographical areas which are relatively easy accessible from Ulaanbaatar. Both are connected to the capital with a reasonable quality sealed road.

**Table 2-19. Average length of stay in nights by market area, leisure visitors (nights)**

Areas visited	France	USA	UK	Japan	Germany	Italy	Korea	Australia	China	Other EU	Other World
Khentii	7	5	4	2	4	2	2	4	4	3	5
Terelj	2	3	3	2	3	2	2	3	1	2	2
Khuvsgul	5	4	7	4	5	3	4	3	4	5	3
Bayan Ulgii / Khovd / Uvs	6	7	7	3	11	3	2	3	7	6	7
Karakorum	2	2	2	2	2	1	1	2	3	2	2
Eastern Mongolia	5	4	12	2	4	2	2	5	0	4	2
Gobi	5	4	4	3	6	4	4	4	3	5	4
Arkhangai / Tekhiin Tsagaan Nuur	6	5	10	3	4	3	5	5	4	4	4

If compared with the length of stay of all visitors, French stay 3 nights longer in Khentii, Germans stay 5 nights longer in the Western Aimags and British stay 5 days longer in Arkhangai. With 12 nights, the British stay 8 nights longer in Eastern Mongolia, the longest stay of any one nationality in any one area. However, it has to be remembered that overall visitor numbers to Eastern Mongolia are very small, e.g. out of a sample of 322 British, only 9 actually visited Eastern Mongolia.

## 2.5. Visitor Centers

*Question: Are you aware that there are now official tourism information centers in UB?*

*Question: Did you visit any of the official tourism information centers in UB? And if yes, which one?*

In 2005, three new official tourism information centers opened in UB, one each in the post office (main hall), airport (near the baggage claim before passengers clear customs) and railway station (main hall). Until then, there were no information centers in Mongolia with involvement by the government or any other non-private entity. Some private tour companies and hotels operated information centers on their premises. The initiators of this survey, USAID facilitated the creation of the first TIC and were interested to gauge visitors' use and

perception. Respondents were asked if they were aware of the centers and if they had visited them.

Of all respondents, 46% stated that they were aware of the new centers, while 20% claimed to have visited one.

**Table 2-20. Location of information centre visited, all visitors (%)**

Location	Proportion of respondents who visited a centre	Proportion of all respondents
Post Office	84	12
Airport	6	1
Railway Station	1	0
Others - Wrongly Defined	9	1

Of the respondents who visited an information centre, the overwhelming majority (84%) visited the one in the post office, meaning that 12% of all visitors to Mongolia went to the information centre at the post office. The post office is located in the centre of town, next to Sukh Baatar Square.

In order to be able to gauge if respondents who claimed to have visited one of the official centers actually did so and not visited one of the private sector ones, an open ended question was included asking respondents to name the particular centre. 9% of respondents who claimed to have visited an official one actually named a location other than the three existing ones.

Respondents were also asked to judge the quality of services they had received at the information centers, using the following scale:

- Excellent
- Good
- Adequate
- Moderate
- Poor

**Table 2-21. Rating of visited information centre, all visitors (%)**

Rating	%
Excellent	19
Good	47
Adequate	16
Moderate	12
Poor	5

The majority of all respondents (66%) who visited an information centre were satisfied (i.e. answered with “Excellent” or “Good”) with its services, an additional 16% found its service “adequate”

**Table 2-22. Awareness of visitors information centre by market area, all visitors (%)**

Awareness	France	USA	UK	Japan	Germany	Italy	Korea	Australia	China	Other EU	Other World
Aware of Centre	48	51	62	21	52	49	22	68	32	53	46
Not Aware of Centre	52	49	38	79	48	51	78	32	68	47	54

Asian visitors from Japan (21%), Korea (22%) and China (32%) are the least aware of the new information centers. More than two thirds of all Australians (68%) and nearly two thirds of all British are aware of the centers, the highest awareness proportion of all nationalities.

**Table 2-23. Visit to tourism information centre by market area, all visitors (%)**

	France	USA	UK	Japan	Germany	Italy	Korea	Australia	China	Other EU	Other World
Visited a Centre	28	20	24	9	21	20	6	29	10	28	20
Not Visited a Centre	72	80	76	90	79	80	94	71	90	72	80

Actual visits to information centers reflect the awareness of the centers, with the least proportion of the three Asian nationalities (Japan 9%, Korea 6% and China 10%) visiting one of the centers, while all other nationalities are close to the overall average of 20%.

**Table 2-24. Location of information centre visited by market area, all visitors (%)**

Location	France	USA	UK	Japan	Germany	Italy	Korea	Australia	China	Other EU	Other World
Post Office	88	85	82	79	86	72	80	81	73	85	83
Airport	3	8	6	11	8	4	10	6	18	6	6
Railway Station	1	0	1	0	2	0	10	0	0	0	2
Others - Wrongly Defined	8	7	10	11	4	14	0	14	9	10	9

While the post office is the most favorite visitor centre with all nationalities, the Chinese (18%), Japanese (11%) and Koreans (10%) have the highest and a much higher than average (6%) proportion of visits to the information centre at the airport.

**Table 2-25. Rating of information centre visited by market area, all visitors (%)**

Rating	France	USA	UK	Japan	Germany	Italy	Korea	Australia	China	Other EU	Other World
Excellent	18	29	16	11	15	8	33	24	17	15	24
Good	32	45	54	50	43	58	33	63	39	55	53
Adequate	24	16	18	14	21	24	8	7	4	13	14
Moderate	22	4	11	18	13	3	25	4	26	10	8
Poor	4	5	1	7	8	8	0	2	13	6	2

**Table 2-26. Awareness of visitor information centers by purpose of visit, all visitors (%)**

Awareness Level	Leisure / Recreation / Holiday	Business / Conference / Professional
Aware of Centre	47	46
Not Aware of Centre	53	54

Both leisure(47%) and business visitors (46%) are equally aware of the existence of the visitor information centers, but a higher proportion of leisure visitors (23%) actually visited one of the centers, compared with business visitors (15%). The centre at the airport gets a slightly higher proportion of business visitors (8%) than leisure visitors (6%). In the rating of the centers' services, there is no major difference in these two visitor groups.

**Table 2-27. Visit to tourism information centre by purpose of visit, all visitors (%)**

	Leisure / Recreation / Holiday	Business / Conference / Professional
Visited a Centre	23	15
Not Visited a Centre	77	85

**Table 2-28. Location of information centre visited by purpose of visit, all visitors (%)**

Location	Leisure / Recreation / Holiday	Business / Conference / Professional
Post Office	84	79
Airport	6	8
Railway Station	1	2
Others - Wrongly Defined	9	11

**Table 2-29. Rating of information centre visited by market area, all visitors (%)**

Rating	Leisure / Recreation / Holiday	Business / Conference / Professional
Excellent	20	17
Good	47	50
Adequate	16	18
Moderate	12	8
Poor	5	6

## 2.6. Crime towards visitors

*Question: Were you a target of a crime?*

*Question: If yes, was this minor (pickpockets, aggressively hassled by drunks) or major (violent assault, robbery)?*

*Question: Where did this take place?*

13% of all respondents were a target of a crime. Of the crime committed towards visitors, 86% was minor in nature and 14% major. Overall this means that 11.4% of all respondents were involved in a minor crime, 1.6% in a major one. Major crime is a concern to visitors: These numbers mean that according to the 2005 survey, out of 1000 visitors, 16 are a target of a major crime such as a violent assault or a robbery.

The overwhelming majority (92%) of all crime towards visitors is committed in UB, the remaining 8% in the countryside. Respondents mentioned various places in UB where they were subject to a crime, such as the Railway Station (1 respondent), Seoul Street (1 respondent), Marco Polo Restaurant (2 respondents), Gandan Monastery (11 respondents) and the State Department Store (14 respondents). The place that was mentioned most by respondents is the Narantuul Market, which sometimes referred to as the Black Market, (122 respondents) in UB, where 36% of all crime took place. 3% of overall respondents were targeted by crime at the Narantuul / Black Market.

All major crime was committed in UB, 16% at the Narantuul Market and 84% at other locations in UB. Visitors to Mongolia are subject to crime at a rate of 13%. The vast majority of crime is committed in UB and no major crime is committed in the countryside making the Mongolian countryside a place reasonably safe from crime. Crime towards visitors was not a subject of any of the earlier surveys so no direct comparisons or trends can be made. However, the 2002 survey concluded in the open ended questions section, that when summarising the results of visitors worst experiences in Mongolia “perhaps the most important finding from the whole survey was the number that had been subjected to a crime”, (Saffery A. and Sugar O., 2003) an estimated 5-7% of all visitors. If this figure is compared with the 2005 figure, crime towards visitors more than doubled.

Respondents had the chance to write about their worst experience in Mongolia in an open ended question Q34. Many respondents mentioned that contact with drunks in various ways was their worst experience in Mongolia.

**Table 2-30. Target of a crime by purpose of visit (%)**

<b>Crime</b>	<b>Leisure/Recreation/ Holiday</b>	<b>Business/Conference/ Professional</b>
Target of Crime	12	18
Not a Target of Crime	86	82

When comparing purpose of visit, more business (18%) than and leisure (12%) visitors are target of a crime. Results of this survey have shown that business visitors tend to spend more time in UB, where most crime is committed, than leisure visitors.

**Table 2-31. Target of a crime by market area (%)**

<b>Crime</b>	<b>France</b>	<b>USA</b>	<b>UK</b>	<b>Japan</b>	<b>Germany</b>	<b>Italy</b>	<b>Korea</b>	<b>Australia</b>	<b>China</b>	<b>Other EU</b>	<b>Other World</b>
Target of Crime	16	15	18	7	9	7	16	13	13	10	12
Not a Target of Crime	84	85	81	93	91	93	84	87	86	90	88

## SECTION III: EVALUATION OF VISITOR EXPERIENCE

### 3.1. Rating of services and facilities

*Question: If you have used any of the following facilities and services, how would you in general rate their standards?*

Respondents were asked to rate the standards of 11 different facilities and services using the following scale:

- Excellent 1
- Good 2
- Adequate 3
- Moderate 4
- Poor 5

An average rating was calculated expressed by the mean of all answers

**Table 3-1. Rating of facilities and services, all visitors (%)**

Service	Excellent	Good	Adequate	Moderate	Poor	Mean	Std. Deviation
Service from Tour Operator	39	40	13	5	3	1.94	0.99
Guide Services	38	35	14	8	5	2.07	1.14
Ger Camps	22	45	22	8	2	2.22	0.96
Availability of Handicraft items	19	41	24	12	4	2.39	1.04
Price Level of Tourism Services	19	40	26	11	4	2.40	1.03
Quality of Handicraft Item	15	44	27	11	3	2.43	0.97
Restaurants	11	48	28	0	10	2.47	0.93
Shopping	11	43	31	12	3	2.54	0.95
Domestic Air Transport	18	35	27	11	8	2.55	1.14
Hotels	8	42	31	13	6	2.66	1.00
Local Ground Transportation	11	30	30	18	11	2.90	1.17

In 2005, visitors rated the service of tour operators most favorable (1.94), with “Guide Services” a close second (2.07). “Local Ground Transportation” (2.90) has the worst overall rating, followed by “Hotels” (2.66).

**Table 3-2. Comparison, rating of facilities and services all visitors 1998, 2002 and 2005 (%)**

Service	Excellent			Good			Adequate			Moderate			Poor		
	1998	2002	2005	1998	2002	2005	1998	2002	2005	1998	2002	2005	1998	2002	2005
Year															
Service from Tour Operator	40	39	39	40	37	40	12	13	13	6	8	5	2	3	3
Guide Services	43	44	38	37	31	35	11	13	14	6	8	8	3	4	5
Ger Camps	25	31	22	54	44	45	15	17	22	5	7	8	1	1	2
Availability of Handicraft items	10	18	19	43	40	41	27	24	24	14	13	12	6	5	4
Price Level of Tourism Services	19	20	19	40	41	40	22	24	26	12	11	11	7	4	4
Quality of Handicraft Item	16	17	15	57	44	44	18	23	27	8	13	11	1	3	3
Restaurants	8	12	11	50	47	48	29	26	28	11	12	10	2	3	3
Shopping	6	11	11	41	41	43	33	29	31	15	15	12	5	4	3
Domestic Air Transport	12	11	18	39	33	35	25	26	27	15	19	11	9	11	8
Hotels	9	12	8	50	42	42	30	26	31	8	15	13	3	5	6
Local Ground Transportation	13	11	11	38	32	30	24	25	30	15	18	18	10	14	11

When comparing the ratings of facilities and services of the 1998 and 2002 with the 2005 survey, there are only a few differences that stick out. More visitors rate the “Quality of Handicraft Items” negatively, “Shopping” has improved on “Moderate” and “Poor”, while “Local Ground Transport” has worse ratings in all categories in 2005 compared with 1998.

**Table 3-3. Comparison of mean rating of facilities and services all visitors 1998, 2002 and 2005 (Mean)**

Service	1998	2002	2005
Service from Tour Operator	1.9	2.01	1.94
Guide Services	1.9	1.97	2.07
Ger Camps	2.0	2.03	2.22
Availability of Handicraft Items	2.6	2.47	2.39
Price Level of Tourism Services	2.5	2.37	2.4
Quality of Handicraft Item	2.6	2.42	2.43
Restaurants	2.5	2.46	2.47
Shopping	2.7	2.61	2.54
Domestic Air Transport	2.7	2.88	2.55
Hotels	2.5	2.59	2.66
Local Ground Transportation	2.7	2.91	2.90
Overall Average Rating	2.42	2.43	2.42

In the 1998 survey, the means were calculated only to one decimal, making a comparison with the two later surveys less precise. When comparing the means of the rating for the services and facilities in Mongolia, it is interesting to note that the average of all mean ratings has stayed nearly constant in 1998 (2.42), 2002 (2.43) and 2005 (2.42). The means of the rating of individual services however have changed over the three surveys. “Guide Services” have received more unfavorable ratings every survey, from 1.9 in 1998 to 2.07 in 2005. “Ger Camps” (2.0 down to 2.22) and “Hotels” (2.5 down to 2.66) following a similar trend, indicating that visitor perception of these three services is declining. An opposite trend can be observed with the rating for “Availability of Handicraft Items” (2.6 up to 2.39) and “Shopping” (2.7 up to 2.54), indicating an improved appreciation by visitors of these services.



The biggest changes between the 2002 and 2005 survey are for “Domestic Air Transport” which saw its rating improved by 0.33 and “Ger Camps” which ratings’ declined by 0.19. “Local Ground Transportation” has been consistently the worst rated facility in all three surveys.

**Table 3-4. Rating of service and facilities by market area, all visitors (mean)**

Service	France	USA	UK	Japan	Germany	Italy	Korea	Australia	China	Other EU	Other World
Service from Tour Operator	1.79	1.63	1.79	2.07	1.81	2.19	2.34	1.70	2.35	1.96	2.02
Guide Services	2.09	1.70	1.88	2.09	1.92	2.51	2.14	2.09	2.49	2.11	2.30
Ger Camps	2.34	2.02	2.00	2.30	2.31	2.45	2.23	2.19	2.39	2.22	2.16
Availability of Handicraft items	2.59	2.20	2.07	2.77	2.15	2.55	2.86	2.02	2.56	2.37	2.36
Price Level of Tourism Services	2.54	2.06	1.99	2.64	2.54	2.65	2.70	2.12	2.81	2.40	2.38
Quality of Handicraft Item	2.57	2.24	2.22	2.83	2.30	2.51	2.95	1.94	2.67	2.34	2.35
Restaurants	2.49	2.28	2.32	2.74	2.42	2.62	2.69	2.39	2.55	2.45	2.46
Shopping	2.46	2.35	2.40	2.79	2.45	2.53	2.92	2.41	2.79	2.54	2.66
Domestic Air Transport	2.50	2.24	2.34	2.91	2.35	2.93	2.98	2.57	2.76	2.44	2.77
Hotels	2.67	2.43	2.48	2.82	2.73	2.85	2.76	2.54	2.91	2.67	2.70
Local Ground Transportation	3.10	2.70	2.68	2.92	2.66	3.05	3.40	2.91	3.20	2.83	3.06
Average	2.47	2.17	2.20	2.63	2.33	2.62	2.72	2.26	2.68	2.39	2.47

The three Asian countries of origin, Japan (2.63), Korea (2.72) and China (2.68) give overall the least favorable ratings of services in Mongolia in 2005, while the US (2.17) and the UK (2.20) give the most favorable. The worst rating is given by Korean (3.40) Chinese (3.20) and French (3.10) for “Domestic Ground Transportation”, the best for “Service from Local Tour Operator” by Americans (1.63) and Australians (1.70).

**Table 3-5. Rating of services and facilities by purpose of visit (mean)**

Service	Leisure / Recreation / Holiday	Visiting Friends & Relatives	Business / Conference / Professional	Employment	Study	Other
Service from Tour Operator	1.89	2.34	2.12	2.47	2.20	2.11
Guide Services	2.05	2.05	2.31	2.30	2.18	2.16
Ger Camps	2.21	2.27	2.28	2.16	2.43	2.19
Availability of Handicraft items	2.39	2.48	2.36	2.28	2.53	2.43
Price Level of Tourism Services	2.37	2.53	2.43	2.50	2.77	2.40
Quality of Handicraft Item	2.44	2.44	2.45	2.08	2.39	2.42
Restaurants	2.45	2.55	2.50	2.38	2.55	2.47
Shopping	2.53	2.53	2.62	2.53	2.62	2.51
Domestic Air Transport	2.50	2.51	2.73	2.38	2.66	2.79
Hotels	2.63	2.80	2.70	2.54	2.73	2.72
Local Ground Transportation	2.86	3.03	3.12	2.83	2.78	2.97
Average Rating	2.39	2.50	2.51	2.40	2.53	2.47

Leisure visitors (2.39) overall rate services and facilities more favorable than all other types of visitors. The most unfavorable rating, again, is given to “Local Ground Transportation” (3.12) by business visitors.

### 3.2. Rating of overall stay in Mongolia

*Question: Overall, how would rate your stay in Mongolia?*

**Table 3-6. Comparison of average rating of overall stay for all visitors 1998, 2002 and 2005 (%)**

Rating	1998	2002	2005
Excellent	47	45	40
Good	46	40	47
Adequate	6	10	8
Moderate	1	5	4
Poor	0	0	1
Mean	1.6	1.77	1.79

There is a clear trend that visitors to Mongolia are rating their overall stay less favourable from 1998 (1.6) to 2005 (1.79), yet the overall rating is still mostly positive, with a mean of 1.79.

**Table 3-7. Comparison of mean rating of overall stay by market area, all visitors 1998, 2002 and 2005 (mean)**

Country of Origin	1998	2002	2005
France	1.8	1.61	1.57
USA	N/A	1.47	1.6
UK	1.5	1.43	1.47
Japan	N/A	1.93	1.96
Germany	1.7	1.78	1.85
Italy	N/A	N/A	2.04
Korea	N/A	2.15	2.11
Australia	N/A	1.51	1.73
China	N/A	N/A	2.33
Other EU	1.7	1.68	1.7
Other World	N/A	1.99	1.87

The overall trend that visitors to Mongolia are rating their overall stay less favorable from 1998 (1.6) to 2005 (1.79) is not always apparent when looking at different nationalities. The largest visitor segment and therefore most important nationality to Mongolia, the French have rated their overall stay in Mongolia more favorable every survey from 1998 (1.8) to 2005 (1.57), while the Germans follow the overall trend, rating their stay less favorable from 1998 (1.7) to 2005 (1.85).

**Table 3-8. Comparison of Average rating of overall stay 1998, 2002 and 2005 (mean)**

<b>Purpose of Visit</b>	<b>1998</b>	<b>2002</b>	<b>2005</b>
Leisure / Recreation / Holiday	1.5	1.64	1.69
Visiting Friends & Relatives	1.6	1.76	1.9
Business / Conference / Professional	1.8	2.03	2.05
Employment	N/A	1.96	1.93
Study	N/A	1.84	1.81
Other	N/A	1.82	1.84
Average	1.6	1.77	1.87

All main visitor groups follow the general trend of rating their overall stay in Mongolia less favourable in 2005 than at the two previous surveys, yet still overwhelmingly positive.

### 3.3. Fulfillment of Expectations

*Question: Did your stay fulfill your expectations?*

**Table 3-9. Comparison of Fulfillment of Expectations, all visitors 1998, 2002 and 2005 (%)**

<b>Answer</b>	<b>1998</b>	<b>2002</b>	<b>2005</b>
Yes	86	80	77
Partly	12	18	21
No	2	2	2

Overall, expectations visitors had for their stay in Mongolia are met. More than three quarter of all visitors (77%) have their expectations fully met, while an additional 20 % of visitors have their expectations at least partly met. There is however a trend those visitors' expectations were less likely to be met in 2005 than in 2002 and 1998. While the number of visitors that stated that their expectations were not fulfilled has stayed constant with 2% in all three surveys, the number of visitors whose expectations were only partly fulfilled has nearly doubled from 12% in 1998 to 21% in 2005. In the same time, the number of visitors that stated that all their expectations were fulfilled dropped from 86% in 1998 to 77% in 2005.

Neither of the three surveys ever attempted to measure or classify what visitors' expectations actually were or included. Therefore it is not possible to state, if for example, visitors' expectations increased or became more sophisticated for their stay in Mongolia over the years, possibly leading to these expectations being increasingly less fulfilled or if visitors' expectations have remain static while fulfillment of these has decreased.

**Table 3-10. Fulfillment of Expectations by market area, all visitors (%)**

<b>Answer</b>	<b>France</b>	<b>USA</b>	<b>UK</b>	<b>Japan</b>	<b>Germany</b>	<b>Italy</b>	<b>Korea</b>	<b>Australia</b>	<b>China</b>	<b>Other EU</b>	<b>Other World</b>
Yes	84	84	88	72	82	76	55	83	69	83	78
Partly	14	15	11	25	17	22	43	15	26	16	22
No	1	1	1	3	0	2	2	2	5	1	1

It stands out that the expectations of the three main Asian visitor groups, Japanese, Koreans and Chinese are less likely to be satisfied than all other visitors. Only 55% of all Korean visitors see their expectations met, while 43% say they were partly met. The highest proportion of visitors who have their expectations met come from the UK, with 88%.

**Table 3-11. Comparison of fulfillment of expectations by market area, all visitors, 1998, 2002 and 2005 (%)**

Answer	Year	France	USA	UK	Japan	Germany	Italy	Korea	Australia	China	Other EU	Other World
Yes	1998	76	N/A	93	N/A	85	N/A	N/A	N/A	N/A	84	N/A
	2002	82	90	90	72	85	N/A	75	89	N/A	83	74
	2005	84	84	88	72	82	76	55	83	69	83	78
Partly	1998	20	N/A	6	N/A	12	N/A	N/A	N/A	N/A	15	N/A
	2002	17	9	9	27	14	N/A	21	8	N/A	16	23
	2005	14	15	11	25	17	22	43	15	26	16	22
No	1998	N/A	N/A	1	N/A	3	N/A	N/A	N/A	N/A	1	N/A
	2002	1	1	1	1	1	N/A	1	3	N/A	1	3
	2005	1	1	1	3	0	2	2	2	5	1	1

Contrary to the general trend, visitors from France stand out as having their expectations increasingly met over the years, from 76 % in 1998 to 84 % in 2005. This concurs with the finding that, also against the general trend, they rate their overall stay in Mongolia more favorable every survey from 1998 (1.8) to 2005 (1.57) (see Table 3.7).

**Table 3-32. Comparison of Fulfillment of Expectations by purpose of visit, 1998, 2002 and 2005 (%)**

Answer	Year	Leisure / Recreation / Holiday	Visiting Friends & Relatives	Business / Conference / Professional	Employment	Study	Other	Average
Yes	1998	85	91	85	N/A	N/A	N/A	86
	2002	82	85	76	67	59	79	80
	2005	80	74	72	64	79	72	77
Partly	1998	13	7	13	N/A	N/A	N/A	12
	2002	17	14	21	22	41	19	18
	2005	19	24	25	33	20	25	21
No	1998	2	2	2	N/A	N/A	N/A	2
	2002	1	1	3	11	0	2	2
	2005	2	2	2	2	1	3	2

More leisure (80%) than business visitors (72%) have their expectation met. Both categories follow the general trend that expectations are less met in 2005 than in 1998 and 2002. 64% of employment visitors have their expectations met, the lowest proportion of all visitor groups. This group also has the steepest drop in “No’s”, from 11% down to 2%.

### 3.4. Likelihood to return to Mongolia

*Question: How likely is it that you will return to Mongolia for a holiday during the next five years?*

The respondents were asked about their likelihood to return to Mongolia for a holiday visit during the next five years using a modified Likert scale with the following five responses:

- Very likely
- Likely

- Uncertain
- Unlikely
- Very Unlikely

**Table 3-13. Comparison of likelihood to return to Mongolia for all visitors 1998, 2002 and 2005 (%)**

Likelihood	1998	2002	2005
Very likely	34	36	32
Likely	29	29	28
Uncertain	23	22	24
Unlikely	9	10	12
Very Unlikely	5	3	4

When looking at the likelihood of all visitors to Mongolia, there is no trend or any significant changes between the three surveys. While there are some changes between 1998, 2002 and 2005 when considering the country of residence of visitors, there is no identifiable trend. Generally, for the majority of visitors to Mongolia (60%) it is either “Very Likely” (32%) or at least “Likely” (28%) to return to Mongolia for a holiday visit.

**Table 3-14. Comparison of likelihood to return to Mongolia for a holiday visit, all visitors by market area 1998, 2002 and 2005 (%)**

Likelihood	Year	France	USA	UK	Japan	Germany	Italy	Korea	Australia	China	Other EU	Other World
Very Likely	1998	31	N/A	34	N/A	34	N/A	N/A	N/A	N/A	32	N/A
	2002	32	37	22	37	34	N/A	41	34	N/A	31	44
	2005	33	35	23	40	33	18	35	32	37	31	34
Likely	1998	29	N/A	24	N/A	30	N/A	N/A	N/A	N/A	30	N/A
	2002	28	24	25	30	31	N/A	30	25	N/A	25	30
	2005	31	20	23	33	26	29	35	27	32	29	26
Uncertain	1998	24	N/A	20	N/A	24	N/A	N/A	N/A	N/A	25	N/A
	2002	29	23	26	24	23	N/A	14	22	N/A	24	17
	2005	23	25	31	20	26	26	21	21	19	24	24
Unlikely	1998	10	N/A	12	N/A	8	N/A	N/A	N/A	N/A	9	N/A
	2002	8	14	26	24	23	N/A	6	16	N/A	15	7
	2005	8	15	18	5	13	22	7	18	9	12	12
Very Unlikely	1998	6	N/A	10	N/A	4	N/A	N/A	N/A	N/A	9	N/A
	2002	3	2	5	2	2	N/A	2	3	N/A	5	2
	2005	4	5	5	3	3	4	2	2	3	4	3

**Table 3-15. Likelihood to return to Mongolia for a holiday visit all visitors by market area (%)**

Likelihood	France	USA	UK	Japan	Germany	Italy	Korea	Australia	China	Other EU	Other World
Very Likely	33	35	23	40	33	18	35	32	37	31	34
Likely	31	20	23	33	26	29	35	27	32	29	26
Uncertain	23	25	31	20	26	26	21	21	19	24	24
Unlikely	8	15	18	5	13	22	7	18	9	12	12
Very Unlikely	4	5	5	3	3	4	2	2	3	4	3

By nationalities, the highest proportion of “Very Likely” return visitors to Mongolia are the three Asian nationalities, Japan (40%), China (37%) and Korea (35%). These are also the nationalities that are least likely to have their expectations met (see Table 3.10.).

**Table 3-16. Comparison of Likelihood to return to Mongolia for a holiday by purpose of visit 1998, 2002 and 2005**

Likelihood		Leisure / Recreation / Holiday	Visiting Friends & Relatives	Business / Conference / Professional	Employment	Study	Other
Very likely	1998	27	44	39	N/A	N/A	N/A
	2002	30	46	44	54	25	46
	2005	28	42	42	45	38	35
Likely	1998	31	23	28	N/A	N/A	N/A
	2002	29	23	30	14	34	30
	2005	28	27	27	33	27	26
Uncertain	1998	27	25	20	N/A	N/A	N/A
	2002	26	22	17	18	22	13
	2005	26	18	19	12	24	29
Unlikely	1998	9	6	9	N/A	N/A	N/A
	2002	12	7	8	11	13	3
	2005	13	11	10	6	10	9
Very Unlikely	1998	6	2	4	N/A	N/A	N/A
	2002	3	2	1	3	13	3
	2005	5	2	2	4	1	2

Less leisure visitors are “Very Likely” to return to Mongolia than business visitors. For the majority of leisure (56%) and business visitors (69%) to Mongolia, it is either “Very Likely” or at least “Likely” to return to Mongolia for a holiday visit.

### 3.5. Recommendation of Mongolia for a holiday visit

*Question: Would you recommend Mongolia to your friends and relatives for a holiday visit?*

**Table 3-17. Comparison of recommendation of Mongolia for a holiday visit, all visitors 1998, 2002 and 2005 (%)**

Answer	1998	2002	2005
Yes	83	76	76
Perhaps	15	21	21
No	2	3	3

There have been no changes between 2002 and 2005 on the proportion of visitors that would, or would not recommend Mongolia for a holiday visit. A high proportion of visitors (76%)

would recommend Mongolia to their friends and family for a holiday visit, while only a small minority (3%) would not.

**Table 3-18. Recommendation of Mongolia for a holiday visit, all visitors by market area (%)**

Answer	France	USA	UK	Japan	Germany	Italy	Korea	Australia	China	Other EU	Other World
Yes	89	72	79	65	77	82	64	75	58	84	75
Perhaps	9	25	18	32	20	17	31	24	36	14	24
No	2	3	3	3	2	1	4	2	6	2	1

An overwhelming proportion of French (89%), Italian (82%) and British (79%) visitors would recommend Mongolia for a holiday visit. While the majority of Chinese (58%), Korean (64%) and Japanese (65%) would recommend Mongolia, these three groups have the lowest percentages compared with the other nationalities. 6% of all Chinese visitors would not recommend Mongolia, which is double the average.

**Table 3-19. Comparison of recommendation of Mongolia for a holiday visit, all visitors by market area 1998, 2002 and 2005 (%)**

	Year	France	USA	UK	Japan	Germany	Italy	Korea	Australia	China	Other EU	Other World
Yes	1998	88	N/A	83	N/A	79	N/A	N/A	N/A	N/A	85	N/A
	2002	91	83	84	58	82	N/A	65	84	N/A	86	80
	2005	89	72	79	65	77	82	64	75	58	84	75
Maybe	1998	10	N/A	12	N/A	19	N/A	N/A	N/A	N/A	13	N/A
	2002	8	15	16	35	15	N/A	30	15	N/A	14	18
	2005	9	25	18	32	20	17	31	24	36	14	24
No	1998	2	N/A	5	N/A	2	N/A	N/A	N/A	N/A	2	N/A
	2002	1	2	0	7	3	N/A	5	1	N/A	0	2
	2005	2	3	3	3	2	1	4	2	6	2	1

**Table 3-40. Recommendation of Mongolia for a holiday visit by purpose of visit (%)**

Answer	Leisure / Recreation / Holiday	Visiting Friends & Relatives	Business / Conference / Professional	Employment	Study	Other
Yes	80	69	67	62	64	63
Maybe	18	26	29	32	35	30
No	2	4	4	6	1	7

With 80%, the majority of leisure visitors will recommend Mongolia, making this the most likely group for recommending Mongolia.

**Table 3-21. Comparison of recommendation of Mongolia for a holiday visit by purpose of visit 1998, 2002 and 2005 (%)**

		<b>Leisure / Recreation / Holiday</b>	<b>Visiting Friends &amp; Relatives</b>	<b>Business / Conference / Professional</b>	<b>Employment</b>	<b>Study</b>	<b>Other</b>
Yes	1998	87	81	78	N/A	N/A	N/A
	2002	79	74	70	82	53	69
	2005	80	69	67	62	64	63
Maybe	1998	11	17	19	N/A	N/A	N/A
	2002	18	22	26	14	31	26
	2005	18	26	29	32	35	30
No	1998	2	2	3	N/A	N/A	N/A
	2002	3	4	4	4	16	5
	2005	2	4	4	6	1	7



## **SECTION IV: VISITOR EXPENDITURE**

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This section outlines respondent's spending patterns for their visit to Mongolia. The reader has to keep in mind that the information the respondents were asked in this section was quite complex and only possible to be answered with considerable thought. Of all the results contained in this report, this section has to be read with the most caution.

Visitors were asked if they were traveling on a package arrangement or not. If they did, they were asked to state the cost of the package arrangement per person. The scope of this survey did not allow to determine what the price of this package tour exactly included. Some might have included the international airfare, others not. If the package tour was booked with a tour company or agent outside Mongolia and paid there, it was not possible to determine the profit margin of the foreign agency which remained outside Mongolia. Respondents were also not asked if their arrangements were arranged by a foreign or Mongolian tour agent.

While visitors were asked if the price they paid for their package arrangement included any stay in a country other than Mongolia, it would not have been possible to determine what proportion of the price was allocated to a stay in a foreign country and what was allocated directly to Mongolia.

Respondents were asked to determine how much money they spent while in Mongolia, regardless of what type of arrangement they traveled with. For this, respondents had to remember the amount of money they spent during their entire stay, which could have covered anything from a few days to three months. There is bound to be some inaccuracy in respondents' answers with them not being able to remember exactly how much money they spent or not wanting to declare all their expenditure. Various questions asked respondents to give a fairly detailed breakdown of their overall expenses in Mongolia with which many respondents will have struggled to remember the exact amounts for a multiple purchase of a collection of items, such as different handicrafts, textile products and their entire accommodation expenses.

Another point that needs to be considered is currency. Respondents were given the choice to use their currency of choice for their answers, and state this currency with their response. This would then have to be converted into US \$, the agreed currency for all results of this survey. Respondents clearly had problems with this, sometimes forgetting to state the currency they used. Sometimes it was possible to determine this by checking their nationality, in other instances it was presumed that the answer was in US \$. With the number of different nationalities, currencies and exchange rates, there will be inconsistencies.

Compared with the rest of the survey, a sizable number of respondents did not or only partly answered the questions in this section. The number of respondents who choose not to answer is particularly high for the questions asking for the detailed breakdown of expenses while in Mongolia. Therefore it was deemed helpful to state the number of respondents for each question so readers know from how many responses these results were drawn from. Readers are reminded that the total number of valid responses for this survey was 4148.

It is also possible that answers in this section might vary from answers in earlier sections. For example, the average length of stay in Table 4.1. only includes the number of respondents that have also answered question Q21, the price of their package tour.

While comparisons with the results from the two earlier surveys are made, these earlier surveys have encountered the same challenges this survey had. In fact, Saffery A. and Sugar O. (2003, page 51) state that "the figures outlined in this section should only be used as a guide rather than accurate measurement of foreign exchange earnings".

#### 4.1. Average total and daily visitor expenditure

*Question: How much did you pay for your package tour including yourself / and your family members, if any? How many persons does this expenditure cover?*

*Questions: In all, how much did you (and your family members travelling with you, if any) spend during your stay here in Mongolia (excluding all pre-paid expenditure items)?*

##### Visitors on package tours arrangements

For visitors on package tours, the average daily expenditure refers to the amount the package tour costs per day, i.e. the total costs divided by the number of days. It does not cover any expenses the visitor incurred while in Mongolia which were not covered by the price of the package tour. For this expenditure see Table 4.9.

**Table 4-1. Comparison of price of package tour, average length of stay and average daily expenditure for all visitors traveling on package arrangements, 1998, 2002 and 2005.**

	1998	2002	2005
Average Price of Package Tour	1609	2133	2142
Average Length of Stay	12	12	14
Average Daily Price	132	181	153

Number of Total Respondents in 2005: 995

There is no significant trend in the price of a package tour or their length between 2002 and 2005. While the average length of stay has lengthened by two nights (12 up to 14), the average price has only marginally increased (2133 up to 2142).

**Table 4-2. Price of package tour, average length of stay and average daily expenditure by market area**

	France	USA	UK	Japan	Germany	Italy	Korea	Australia	China	Other EU	Other World
Average Price of Package Tour	2188	3022	1926	1183	1698	1764	1335	2367	1652	1997	1446
Average Length of Stay	16	12	18	6	18	17	6	16	10	14	12
Average daily Price	135	251	107	189	95	107	223	145	165	145	117
Number of Total Respondents	171	155	130	57	72	72	25	32	10	132	45

Package arrangements for three main Asian visitor groups of Japan, Korea (both 6 nights) and China (10 nights) are the shortest, while package for Europeans tend to be longer with Germany and the UK being the longest (both 18 nights). At 3022 US \$, Americans pay the most for their package tours and pay also the highest price per day (251 US \$).

**Table 4-3. Comparison of price of package tour, average length of stay and average daily expenditure by market area, 1998, 2002, 2005**

	Year	France	USA	UK	Japan	Germany	Italy	Korea	Australia	China	Other EU	Other World
Price of Package	1998	1628	N/A	1203	N/A	1562	N/A	N/A	N/A	N/A	1551	N/A
	2002	2037	2872	2341	1910	1738	N/A	925	3074	N/A	2134	1731
	2005	2188	3022	1926	1183	1698	1764	1335	2367	1652	1997	1446
Length of Stay	1998	15	N/A	12	N/A	14	N/A	N/A	N/A	N/A	14	N/A
	2002	14	12	16	7	15	N/A	9	14		15	11
	2005	16	12	18	6	18	17	6	16	10	14	12
Daily Expenditure	1998	111	N/A	103	N/A	109	N/A	N/A	N/A	N/A	111	N/A
	2002	141	244	144	288	118	N/A	105	229	N/A	142	157
	2005	135	251	107	189	95	107	223	145	165	145	117

**Individual Arrangements**

While it is difficult to determine for visitors on package arrangements how much of the package price is actually spent in Mongolia, visitors making their own arrangements can give a good indication how much money is spent in country.

**Table 4-4. Comparison of total expenditure, length of stay and daily expenditure of visitors on own arrangements, 1998, 2002 and 2005**

	1998	2002	2005
Total Expenditure	1008	832	674
Average Length of Stay	16	14	15
Average Daily Expenditure	63	60	44

Number of Total Respondents in 2005: 1983

While the average length of stay has remained nearly constant between 1998 (16 nights) and 2005 (15 nights), the total expenditure per visitor in Mongolia has dropped for every surveyed year, from 1008 US \$ in 1998 to 674 US \$ in 2005.

**Table 4-5. Total expenditure, length of stay and daily expenditure of visitors on own arrangements by market area**

	France	USA	UK	Japan	Germany	Italy	Korea	Australia	China	Other EU	Other World
Total Expenditure	587	826	724	438	931	724	497	762	370	593	661
Average Length of Stay	19	14	18	7	18	17	9	17	9	16	12
Average Daily Expenditure	32	60	40	61	51	42	57	45	42	36	53
Number of Total Respondents	309	295	250	148	156	119	88	53	38	330	123

Germans on individual arrangements spent the most money in Mongolia (931 US \$) and stay together with the French (19 nights) and the British (18 nights) as the longest with 18 nights. Americans come second with their overall expenditure of 826 US \$ per person. On a per day

basis, Japanese are the highest spenders with 61 US \$ per day, but with 7 nights, they also stay the shortest time. The French are the lowest per day spenders with 32 US \$.

**Table 4-6. Comparison of total expenditure, length of stay and daily expenditure of visitors on own arrangements by market area, 1998, 2002 and 2005**

	Year	France	USA	UK	Japan	Germany	Italy	Korea	Australia	China	Other EU	Other World
Total Expenditure	1998	1147	N/A	1052	N/A	815	N/A	N/A	N/A	N/A	944	N/A
	2002	926	981	1063	668	896	N/A	699	995	N/A	827	704
	2005	587	826	724	438	931	724	497	762	370	593	661

Length of Stay	1998	21	N/A	16	N/A	15	N/A	N/A	N/A	N/A	16	N/A
	2002	20	16	20	9	15	N/A	10	17	N/A	16	12
	2005	19	14	18	7	18	17	9	17	9	16	12

Daily Expenditure	1998	56	N/A	65	N/A	54	N/A	N/A	N/A	N/A	58	N/A
	2002	46	61	54	75	59	N/A	73	58	N/A	53	60
	2005	32	60	40	61	51	42	57	45	42	36	53

Most nationalities on individual arrangements follow the overall trend of spending less in Mongolia for every of the three surveys. Germans are the only exception, spending more every time, from 815 US \$ in 1998 to 931 US \$ in 2005. There are only minor changes in the average length of stay: the French are staying shorter (21 nights in 1998 down to 19 in 2005) while the Germans made a three night leap from 2002 (15 nights) to 2005 (18 nights). The average daily expenditure has dropped for every nationality for every survey.

**Table 4-7. Total expenditure, length of stay and daily expenditure by purpose of visit on own arrangements**

	Leisure / Recreation / Holiday	Visiting Friends & Relatives	Business / Conference / Professional	Employment	Study	Other
Total Expenditure	761	592	849	1154	981	869
Average Length of Stay	16	13	10	43	29	19
Average Daily Expenditure	48	44	85	27	34	47
Number of Total Respondents	993	155	432	21	41	66

The small number of “Employment”, “Study” and “Other” visitors spend the most money during their stay (1154, 981 and 869 US \$ respectively) and stay the longest time (43, 29 and 19 nights), but therefore have the lowest per day expenditure (27, 34 and 47 US \$). More interesting are the two largest visitor segments to Mongolia: business visitors who stay the shortest time (10 nights) and have the highest amount of daily expenditure (85 US \$), followed by leisure visitors who stay for 16 nights, spending 48 US \$ per day.

**Table 4-8. Comparison of total expenditure, length of stay and daily expenditure by purpose of visit on own arrangements, 1998, 2002 and 2005**

	Year	Leisure / Recreation / Holiday	Visiting Friends & Relatives	Business / Conference / Professional	Employment	Study	Other
Total Expenditure	1998	1055	548	1131	N/A	N/A	N/A
	2002	804	632	901	933	865	975
	2005	761	592	849	1154	981	869
Average Length of Stay	1998	15	17	15	N/A	N/A	N/A
	2002	14	15	12	32	29	19
	2005	16	13	10	43	29	19
Average Daily Expenditure	1998	69	33	78	N/A	N/A	N/A
	2002	58	42	75	29	30	52
	2005	48	44	85	27	34	47

The two main visitor groups, leisure (1055 down to 761 US \$) and business (1131 down to 849 US \$) follow the overall trend of spending less in Mongolia for every survey from 1998 to 2005. While business travelers stay shorter (from 15 down to 10 nights) they spent more money per day in 2005 (85 US \$) than in 2002 (75 US \$) and 1998 (78 US \$). Leisure visitors average length of stay has changed only slightly over the three surveys (1998: 15 nights, 2002: 14 nights, 2005: 16 nights) but their daily expenditure has dropped by 21 US \$ from 1998 (69 US \$) to 2005 (48 US \$).

#### 4.2. Average itemized expenditure

*Question: Try to give a breakdown of your total expenditure in Mongolia, to the best of your recollection, according to the following broad categories (excluding all pre-paid expenditure and items included in package tours)?*

Question Q26 tries to give a breakdown of the money visitors spend while in Mongolia. Some of the challenges regarding the accuracy of the results for this question have been mentioned in the introduction to this section. In addition, there are further tendencies that have to be taken into account with this question. 591 respondents on package arrangements answered this question. However, there are a total of 1384 respondents who stated in question Q19 that they are traveling on package arrangements, a considerable shortfall of 793 respondents who didn't answer this question. There might be various reasons for not answering this question of which one might be of special importance. By not answering this question, a visitor on a package arrangement might actually indicate that there were no additional expenses incurred at all while in Mongolia. In this case, the total spending for visitors on package arrangements of 414 US \$ would be lower, if package visitors who didn't answer this question would still be included in the number of valid responses. Therefore, the results of the itemized expenditure has to be read with caution. In the survey, all questions were categorized with additional labels (see Appendix 1).

**Table 4-9. Averaged itemized expenditure for all visitors by arrangement**

	<b>Package Arrangement</b>		<b>Own Arrangement</b>		<b>Overall</b>	
Number of valid responses	591		1378		1969	
	US \$	%	US \$	%	US \$	%
Accommodation	63	15	235	32	182	29
Restaurants	50	12	126	17	102	16
Organized Sightseeing	67	16	90	12	85	13
Other Ground Transportation	14	3	77	11	57	9
Domestic Air Transport	8	2	21	3	17	3
Handicrafts	86	21	54	7	63	10
Textiles	80	19	60	8	66	10
Other Spending	46	11	67	9	61	10
<b>TOTAL</b>	<b>414</b>	<b>100</b>	<b>729</b>	<b>100</b>	<b>634</b>	<b>100</b>

While in Mongolia, package visitors spend the most money on souvenirs, both handicrafts (86 US \$) and textiles (80 US \$). The least money is spent on domestic transportation, air (8 US \$) and ground (14 US \$). Both these expenses are generally covered by the cost of the package tour paid in advance.

Individual travelers spent most money on trip necessities, topped by accommodation costs (235 US \$) and restaurants (126 US \$) which together at 49% is nearly half their expenditure in Mongolia. While it is not possible to determine how much money of the price of a package tour actually is paid out in Mongolia, it is certain that all money individual travelers spent in Mongolia is going directly into the Mongolian economy.

**Table 4-10. Comparison of average itemized expenditure for all visitors on package arrangements 1998, 2002 and 2005**

<b>Year</b>	<b>US \$</b>			<b>%</b>		
	<b>1998</b>	<b>2002</b>	<b>2005</b>	<b>1998</b>	<b>2002</b>	<b>2005</b>
Accommodation	6	31	63	3	9	15
Restaurants	24	37	50	10	11	12
Organized Sightseeing	4	26	67	2	8	16
Other Ground Transportation	3	7	14	1	2	3
Domestic Air Transport	0	7	8	0	2	2
Handicrafts	98	96	86	43	29	21
Textiles	56	72	80	24	22	19
Other Spending	38	66	46	17	20	11
<b>TOTAL</b>	<b>229</b>	<b>334</b>	<b>414</b>	<b>100</b>	<b>100</b>	<b>100</b>

There is a trend that the package visitors reached by the survey spend increasingly more money in Mongolia for costs not included in their package, from 229 US \$ in 1998 up to 414 US \$ in 2005. Apart from “Handicrafts”, which decreased over the three surveys (1998: 98 US \$, 2005: 86 US \$) all other items increased accordingly, with “Accommodation” increasing the most by 57 US \$ from 6 US \$ in 1998 to 63 US \$ in 2005.

**Table 4-11. Comparison of average itemized expenditure for all visitors on individual arrangements 1998, 2002 and 2005**

	<b>US \$</b>	<b>%</b>
--	--------------	----------



Year	1998	2002	2005	1998	2002	2005
Accommodation	420	294	235	42	35	32
Restaurants	158	141	126	16	17	17
Organized Sightseeing	143	90	90	14	11	12
Other Ground Transportation	66	71	77	7	9	11
Domestic Air Transport	23	24	21	2	3	3
Handicrafts	60	70	54	6	8	7
Textiles	61	68	60	6	8	8
Other Spending	77	74	67	8	9	9
TOTAL	1008	832	729	100	100	100

Contrary to the trend of package visitors, visitors on individual arrangements spend overall less money in Mongolia every survey, from 1008 US \$ in 1998 down to 729 US \$ in 2005. While all items decreased accordingly, the only item that increased constantly in the same period is “Other Ground Transportation”, from 66 US \$ in 1998 to 77 US \$ in 2005. By proportion of the total expenditure, the percentage of most items did not change, apart from “Accommodation” which dropped by 10%, from 42% in 1998 to 32% in 2005.

**Table 4-12. Comparison of averaged itemized expenditure for all visitors, overall 1998, 2002 and 2005**

Year	US \$			%		
	1998	2002	2005	1998	2002	2005
Accommodation	319	207	182	39	30	29
Restaurants	126	111	102	15	16	16
Organized Sightseeing	109	69	85	13	10	13
Other Ground Transportation	51	50	57	6	7	9
Domestic Air Transport	18	19	17	2	3	3
Handicrafts	69	84	63	8	12	10
Textiles	60	78	66	7	11	10
Other Spending	67	69	61	8	10	10
TOTAL	819	687	634	100	100	100

**Table 4-13. Averaged itemized expenditure for leisure visitors on individual arrangements by market area in US \$**

Expenditure	France	USA	UK	Japan	Germany	Italy	Korea	Australia	China	Other EU	Other World
Accommodation	112	217	145	163	105	113	144	118	112	104	214
Restaurants	70	129	106	145	71	80	79	125	88	92	102
Organized Sightseeing	195	121	112	89	133	178	110	336	47	184	97
Other Ground Transportation	129	83	102	27	127	64	68	26	48	77	69
Domestic Air Transport	13	26	14	43	35	2	8	59	15	34	22
Handicrafts	46	59	61	43	38	44	37	178	68	34	62
Textiles	34	61	49	33	51	106	53	174	46	37	73
Other Spending	31	98	51	64	46	34	73	162	21	59	106
TOTAL	629	794	641	608	605	622	573	1178	445	621	746
Number of Respondents	105	112	92	54	54	33	41	22	26	132	52

When categorizing the itemized expenditure by nationality some results stand out. Australians on individual arrangements were at 1178 US \$ the highest total spenders, but there were only 22 respondents from whom this data was collected. Second highest spenders were Americans with 794 US \$, lowest were Chinese (445 US \$) and Koreans (573 US \$). Americans spend a

high proportion on accommodation (217 US \$, 27%), while the French (195 US \$, 31%) and the Italians (178 US \$, 29%) spent on organized sightseeing, the Japanese on restaurants (145 US \$, 24%) and the Italians on textiles (106 US \$, 17%)

Japanese spent low on “Other Ground Transportation” (27 US \$, 4%), while Italians (2 US \$, 0%) and Koreans (8 US \$, 1%) spent low on “Domestic Air Transport”.

**Table 4-14. Averaged itemized expenditure for leisure visitors on individual arrangements by market area in %**

Expenditure	France	USA	UK	Japan	Germany	Italy	Korea	Australia	China	Other EU	Other World
Accommodation	18	27	23	27	17	18	25	10	25	17	29
Restaurants	11	16	17	24	12	13	14	11	20	15	14
Organized Sightseeing	31	15	17	15	22	29	19	29	11	30	13
Other Ground Transportation	21	10	16	4	21	10	12	2	11	12	9
Domestic Air Transport	2	3	2	7	6	0	1	5	3	5	3
Handicrafts	7	7	10	7	6	7	6	15	15	5	8
Textiles	5	8	8	5	8	17	9	15	10	6	10
Other Spending	5	12	8	11	8	5	13	14	5	10	14
TOTAL	100	100	100	100	100	100	100	100	100	100	100
Number of Respondents	105	112	92	54	54	33	41	22	26	132	52

**Table 4-15. Averaged itemized expenditure for leisure and business visitors on individual arrangements by purpose of visit**

	Leisure / Recreation / Holiday		Business / Conference / Professional	
	US \$	%	US \$	%
Accommodation	108	19	427	47
Restaurants	78	14	188	21
Organized Sightseeing	115	20	27	3
Other Ground Transportation	53	9	55	6
Domestic Air Transport	18	3	14	2
Handicrafts	67	12	52	6
Textiles	66	12	71	8
Other Spending	58	10	69	8
TOTAL	562	100	900	100
Number of Respondents	1327		397	

On individual arrangements, business visitors have a very different spending pattern than leisure visitors. Firstly, at 900 US \$, they spend substantially more than leisure visitors (562 US \$). Nearly half (47%, 427 US \$) of all expenditure of business visitors is spent on accommodation, a further 21% (188 US \$) on restaurants. All other expenditures of business visitors are below 10% (90 US \$) of the total. The highest expenditure of leisure visitors on individual arrangements is on “Organized Sightseeing” (115 US \$, 20%), followed by “Accommodation” (108 US \$, 19%). They spent proportionally similar amounts on “Restaurants” (14%), “Handicrafts” and “Textiles” (both 12%) as well as “Other Spending” (10%).



## **SECTION V: VISITOR'S COMMENTS**

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### **5.1. Best experience in Mongolia**

*Question: What is your best memory/experience in Mongolia?*

The overwhelming majority of positive impressions on Mongolia were related to three fields: Mongolian people, traditional culture and the natural environment. Many of the mentioned highlights combined two or all three of these factors, for example, “riding a horse with nomads through the steppe”.

Contact with Mongolian people and families were the highlight for 830 visitors, which means that for a quarter of all respondents, interaction with Mongolians was the best memory of their trip. “Friendly” was the most often used attribute for Mongolians, by 220 respondents, openness and hospitality were also frequently mentioned. Nearly 400 respondents had a positive experience by visiting or staying in a ger and meeting what they described as “nomads”. Learning about or coming into contact with what visitors perceived as “traditional Mongolian culture” was a highlight for 150 respondents. Guides (30 respondents) and drivers (15 respondents) were singled out only by a minority as having contributed to a positive experience.

As in previous surveys, Mongolia’s natural environment was still the best memory by a large number of visitors. Respondents expressed this by mentioning “Mongolian landscape” (300 respondents), “countryside” (250 respondents) and “scenery” (240 respondents). Other less frequently used words describing positive experience with the natural environment were “wildlife”, “steppe”, “mountains” and “lakes”. Many respondents specified particular locations such as national parks and lakes they had traveled to, in particular the Gobi (270 respondents) and Lake Khovsgol (80 respondents).

Activities that combined Mongolian culture and the natural environment ranked high on visitors positive memories. 410 respondents singled out “horse riding” as their best experience, while others mentioned camel riding and hiking. A small number of respondents (20) enjoyed traveling by overnight train within Mongolia.

The three main highlights of people, culture and nature were also the main findings of the 2002 survey. Less remarks seem to have been made in 2005 about tourism related personnel such as guides, drivers and tour operators while festivals such as Naadam were, unlike in 2002, the highlight for only a few respondents.

### **5.2. Worst experiences in Mongolia**

*Question: What is your worst memory / experience of Mongolia?*

Tourism related infra structure topped the list of worst memories for visitors to Mongolia. The quality of the road network was mentioned by over 300 respondents who all judged Mongolian roads to be in a very bad state. This concurs with Table 3.1. which gives “local ground transportation” the lowest visitor rating of all the given choices. Driving related issues were mentioned 120 times, including the poor quality of vehicles used, uncomfortable vehicles, driving style of the drivers and vehicle breakdowns. Taxis and their drivers, mostly in UB, received 120 negative comments: the majority being overcharging of passengers as well as bad driving skills. Some respondents also claimed that they had been assaulted by their taxi drivers.

After transport, accommodation was the second most complained about experience, mentioned by 280 respondents. Again, this concurs with the findings of Table 3.1. The negative responses were nearly evenly split between ger camps and hotels, the latter mostly in UB. Complaints focused on the general standard of the facilities and services as well as the impression that accommodation was not value for money. Quality and friendliness of staff were also mentioned, as was the lack of some services, in particular the availability of hot water. The lack of cleanliness of gers in ger camps annoyed respondents and some complained that their gers leaked water in bad weather.

Food and restaurants were remarked on negatively by 180 respondents. For restaurants the complaints were mostly about hygiene and illness as a result thereof as well as the quality of service, such as the unavailability of items on the menu and long waiting times for food. Food in general referred to the availability of food in Mongolia and in particular its variety. The amount of meat in the diet was also criticized.

Air travel and airports were criticized 80 times, evenly split between domestic and international air traffic. Internationally, it was delayed or cancelled flight that formed the majority of complaints, sometimes together with how a delay was handled, e.g. missing announcements and customer care. For domestic flights delays, the price of tickets and the difficulty of obtaining them were mentioned. Of the four international airlines that fly to Mongolia, only MIAT and Aeroflot were mentioned, mostly in regards to flight delays.

Tour operators and guides received 100 complaints. Most complaints about the guide were not further detailed, but issues such as language ability, drinking alcohol while guiding, leaving clients and general knowledge were some of the issues when this was further explained. The reasons for some tour operators receiving criticism were the lack of professionalism, lack of planning and preparation, price of the tours and general standards of service.

Ulaanbaatar was perceived negatively by many respondents, over 100 simply put UB as their worst experience without further detailing it. Others further specified this as including air pollution, garbage lying in the streets, street lighting and beggars. 130 respondents complained about the traffic in UB, including the volume of it, driving skills, rudeness of drivers and noise pollution.

Environmental issues also caused concerns for more than 100 visitors. The largest complained was related to garbage, how it was treated and disposed off. Many visitors criticized the amount of garbage being found in the countryside but also in UB. Pollution of air and water were also mentioned. Visitors remarked that they were often missing access to a reliable source of clean drinking water. Mongolian toilets were not perceived as adequate and 150 respondents commented on this. Toilets in the countryside, ger camps, restaurants and hotels were all criticized, for lack of cleanliness and hygienic standards.

Visitors perceived that alcohol is an issue if not a problem in Mongolia. Over 130 respondents commented on alcohol related problems, including being assaulted or hassled by drunks, the amount of drunk people around, being forced to drink socially or having to deal with a person such as a guide that had been drinking.

The 2002 survey comes to similar findings for visitors' complaints and worst experiences. In the 2002 survey, accommodation and infrastructure received similar complaints as the 2005 survey and topped the number of responses. All other issues this survey commented on were also issues for visitors in 2002. The only identifiable difference seem to be issues related to air transportation which receive less complaints in 2005 than in 2002, which incidentally also had the biggest improvement in customer ratings in Table 3.3.

### 5.3. Suggestion for improvements

*Question: What could have made your trip better or more enjoyable?*

The overwhelming majority of suggestions to improve respondents visit to Mongolian were directly related to their worst experiences. Respondents who commented negatively on Mongolian roads wished for an improved road network, respondents with environmental concerns suggested working on improving air and water quality as well as dealing with the garbage problem they perceived Mongolia had and respondents who had bad experiences with drunken people said that their time in Mongolia would have been a lot better without meeting them.

Additionally, visitors were frustrated with communication barriers between them and the Mongolian people, wishing they could speak some Mongolian or that the number of Mongolians speaking English would have been greater. Visitors also would have appreciated better information sources on such things as activity options or geographical information. Some also lamented that better maps with more information should be available for purchase. Many visitors found that their stay was too brief and that they wished they could have stayed longer.

Results in 2005 are similar with the results of the 2002 survey. The 2002 survey found that “the majority of comments reflected the answers given for their worst experiences” (Saffery A. and Sugar O., 2003). The concerns for the environment were highlighted in 2002, as was the access to more information and better maps.

### 5.4. Surprising facts about Mongolia

*Question: What did you find surprising about Mongolia when comparing your preconceived ideas before arrival and your experiences?*

When asked what surprised respondents about Mongolia, some of the answers reflected their positive experiences they had while in Mongolia. In general answers focused on a few topics.

Many respondents were surprised how modern UB was. Most expressed this in a positive way, like the availability of foodstuff and consumer goods, the number of good restaurants and pubs and the fashion of clothing. Some also saw this as negative and were surprised by the pollution, the amount of traffic and the size of UB. Some respondents even called UB an ugly city. The contrast between UB as a modern city and the countryside also was surprising to some.

The friendliness and openness of the Mongolian people surprised many and they commented very positively on this. The landscape, vastness of the countryside, beauty of nature and the open steppe also surprised visitors as did the fact that on the countryside the tradition of nomadism is still strongly upheld. Some were surprised about the weather, mainly that it was warmer than expected, but some also experienced more rain than they expected. For many, the food was better than expected, while for some, the roads were worse than expected.

The 2002 survey had similar results and mentioned the perceived surprises about UB and life in the countryside in particular.

## 5.5. Mongolia's competing countries

*Question: Other than Mongolia, what other countries did you consider visiting this year?*

When asked what other countries respondents considered visiting in 2005, 1603 respondents answered this question. It is not known if respondents who didn't answer simply choose not to answer this question or if they never considered any other country to visit in 2005 other than Mongolia.

Answers given by respondents covered countries on all six continents. They included developed countries such as Germany and France and developing countries such as Nepal and Peru. There is no identifiable type of country that was considered for respondents as a main alternative to Mongolia for a visit. Many respondents listed more than one country.

Table 69 lists the 17 most popular countries, headed by China, which more than a quarter of respondents (27%) considered visiting in 2005, making it the one outstanding alternative choice. All other countries scored less than 10%, making China the one country that seems to be competing with Mongolia for visitor's choice. Asian countries were the majority of alternatives for visiting choices with 74% of visitors considering another Asian country an option to Mongolia. The 2002 survey's results did not provide any numbers and a comparison has not been possible.

**Table 5-1. Top 17 countries visitors considered visiting other than Mongolia in 2005**

Country	Number of Respondents	% of Respondents
China	433	27
India	151	9
Russia	130	8
Thailand	127	8
USA	117	7
Vietnam	108	7
Japan	106	7
France	101	6
Italy	77	5
Australia	76	5
Cambodia	68	4
New Zealand	62	4
Korea	60	4
Nepal	48	3
Tibet	47	3
Argentina	47	3
Turkey	32	2

## 5.6. Why Mongolia over other considered countries

*Question: Why did you choose Mongolia over these countries?*

The majority of respondents choose Mongolia over the other countries they considered of visiting in 2005 for reasons related to its natural environment. Reasons stated were Mongolia's remoteness, open spaces, scenery untouched and unspoiled nature, wild country and wilderness. This concurs with the findings of Table 2.6, stating that 78% of all visitors choose Mongolia because of its natural scenery.

The second largest segment preferred Mongolia because they knew persons there whom they were visiting. This included both friends and relatives who were living in Mongolia at the time of their visit.

The last identifiable major segment, the visitors who stated either work or business reasons for choosing Mongolia over the other considered countries.

Other reasons mentioned by some respondents were the desire to experience Mongolian culture and the ability to go horse riding in Mongolia.

The three main reasons are also reflected in the results of the 2002 survey. That year, a strong reason for choosing Mongolia were the recommendations from travel agents and personal contacts. This cannot be concluded from the results of the 2005 survey.



## SECTION VI: LIST OF REFERENCES

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## **ANNEX A: VISITOR QUESTIONNAIRE**

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## ANNEX A: VISITOR QUESTIONNAIRE



### Mongolian International Tourism Survey 2005 Economy Policy Reform and Competitiveness Project

Name of Interviewer: \_\_\_\_\_ Date: \_\_\_\_\_

Flight Number: \_\_\_\_\_ Destination: \_\_\_\_\_

**Q1. Are you a visitor to Mongolia?** *(If living here or Mongolian resident, discontinue interview)*

☐ Yes ☐ No

**Q2. If visitor: When did you arrive in Mongolia?**

\_\_\_\_\_

**Q3. How many nights did you spend in Mongolia?**

\_\_\_\_\_

**Note:** Discontinue interview if the visitor has not stayed at least one night or stayed longer than 3 months (92 days)

**Q4. What is your usual country of residence?**

\_\_\_\_\_

**Q5. Gender**

☐ Male ☐ Female

**Q6. What is your current occupation?**

\_\_\_\_\_

**Q7. To which of the following age group do you belong?**

- |                                |                                       |
|--------------------------------|---------------------------------------|
| <input type="checkbox"/> 15-19 | <input type="checkbox"/> 20-29        |
| <input type="checkbox"/> 30-39 | <input type="checkbox"/> 40-49        |
| <input type="checkbox"/> 50-59 | <input type="checkbox"/> 60 and above |

**Q8. What was your main purpose of visiting Mongolia?**

- |   |   |
|---|---|
| <input type="checkbox"/> Leisure/Recreation/Holiday       | <input type="checkbox"/> Visiting Friends & Relatives |
| <input type="checkbox"/> Business/Conference/Professional | <input type="checkbox"/> Employment                   |
| <input type="checkbox"/> Study                            |   |
| <input type="checkbox"/> Other                            |   |

**If Holiday Visitor: Continue**

**If Not: Go To Question 10**

**Q9. What was your main reason for choosing Mongolia?**

*(Multiple answers allowed)*

- |   |   |
|---|---|
| <input type="checkbox"/> Natural Scenery                        | <input type="checkbox"/> Wildlife Watching                |
| <input type="checkbox"/> Mongolian Tradition and Culture        | <input type="checkbox"/> Mongolian History/ Chinggis Khan |
| <input type="checkbox"/> Adventure Tours (Riding/Biking/Hiking) | <input type="checkbox"/> Fishing                          |
| <input type="checkbox"/> Hunting                                | <input type="checkbox"/> Special Interest Tours, Specify: |
| <input type="checkbox"/> Other _____                            | _____   |

**Q10. Have you visited Mongolia before?**

☐ Yes

☐ No

**Q11. If yes, how many times have you visited Mongolia before?**

☐ 1 visit before

☐ 2 visits before

☐ 3 or more visits before

**Q12. What were your main sources of information on Mongolia?** (multiple answers allowed)

☐ Friends/Relatives

☐ Previous Visits

☐ Travel Agent/Tour Operator

☐ Internet Information (websites)

☐ TV, Radio, Newspapers

☐ Travel Guidebooks

☐ Other

☐ Specialist Magazines

**Q13. Are you aware that there are now official tourism information centres in UB?**

☐ Yes

☐ No

**Q14. Did you visit any of the official tourist information centres in UB?**

☐ Yes

☐ No

If yes, which one

Please rate their services would you say it was:

☐ Excellent

☐ Good

☐ Adequate

☐ Moderate

☐ Poor

**Q15. Are you travelling alone, or in a group**

☐ Alone

☐ in a group

If in a group: Continue

If Alone: Go To Question 17

**Q16. If in a group, who else is travelling with you?** (multiple answers allowed)

Spouse/Partner

Number of other adults

Number of Family Children

Number of other children

Number of Family Adults

Total

**Q17. Apart from Mongolia, are you visiting other countries on this trip?**

☐ Yes

☐ No

If yes, what are the other countries you are visiting on this trip?

1

2

3

4

And how many nights have you spent in each place?

1

2

3

4

**Q 18. Which of the following places, national parks and attractions did you visit while in Mongolia? And how many nights did you spend in each place? (if on a day trip to a certain place, write 0 in the blank for nights ) (multiple answers allowed)**

Q 18.1. Ulaanbaatar	<input type="text"/>	Q 18.2. Khentii	<input type="text"/>
Q 18.3. Terelj	<input type="text"/>	Q 18.4. Khuvsgul	<input type="text"/>
Q 18.5. BayanUlgii / Khovd / Uvs	<input type="text"/>	Q 18.6. Karakorum	<input type="text"/>
Q 18.7. Eastern Mongolia (Dornod/Sukhbaatar)	<input type="text"/>	Q 18.8. Gobi	<input type="text"/>
Q 18.9. Arkhangai / Tekhiin Tsagaan Nuur	<input type="text"/>		

**Q 19. Are you travelling on a package tour or did you make your own travel arrangements?**

☐ Package Tour ☐ Own Arrangement

**If Package Tour: Continue**

**If Own Arrangement: Go To Question 24**

**Q 20. What is the name of the Tour Operator with whom you were travelling ?**

**Q 21. How much did you pay for your package tour including yourself / and your family members if any?**

Amount  Currency   
How many persons does this expenditure cover?

**Q 22. Apart from the international airfare, what else did the package include ?**

<input type="checkbox"/> Accommodation	<input type="checkbox"/> Meals
<input type="checkbox"/> Domestic Airfares	<input type="checkbox"/> Domestic Ground Transportation
<input type="checkbox"/> Sightseeing Tours/Excursions	<input type="checkbox"/> Other <input type="text"/>

**Q 23. Does the price of the package tour include any stays in other countries?**

☐ Yes ☐ No

**Now Go To Question 25**

**Visitors on Own Arrangement Only**

**Q 24. Apart from the airfare, have you paid in advance for any other services?**

☐ Yes ☐ No

If yes, state which services and, if possible, the cost of the individual services (the cost for the whole family, if in a family group)

	Amount	Currency
Accommodation	<input type="text"/>	<input type="text"/>
Meals	<input type="text"/>	<input type="text"/>
Domestic Air Fares	<input type="text"/>	<input type="text"/>
Domestic Ground Transportation	<input type="text"/>	<input type="text"/>
Sightseeing / Excursions	<input type="text"/>	<input type="text"/>
Personal Guide / Interpreter	<input type="text"/>	<input type="text"/>
How many persons does this expenditure cover?	<input type="text"/>	

#### All Visitors

Q25. In all, how much did you (and your family members travelling with you, if any ) spend during your stay here in Mongolia (excluding all pre-paid expenditure items) ?

Amount  Currency

How many persons does this expenditure cover?

Q 26. Try to give a breakdown of your total expenditure in Mongolia, to the best of your recollection, according to the following broad categories (excluding all pre- paid expenditure and items included in package tours)

	Amount	Currency
Q 26.1 Accommodation ( including room charges, food / beverage and other services)	<input type="text"/>	<input type="text"/>
Q 26.2. Restaurants and bars outside places of stay	<input type="text"/>	<input type="text"/>
Q 26.3. Organised sightseeing tours, excursions, and activities ( incl. tour transportation)	<input type="text"/>	<input type="text"/>
Q 26.4. Other / separate domestic ground transportation ( car rental, petrol, taxi)	<input type="text"/>	<input type="text"/>
Q 26.5. Other separate domestic air transportation	<input type="text"/>	<input type="text"/>
Q 26.6. Handicrafts (e.g. paintings / drawings, carvings, ethnic costumes, jewellery, souvenirs)	<input type="text"/>	<input type="text"/>
Q 26.7. Textiles, clothes, leather products, cashmere and camel wool products	<input type="text"/>	<input type="text"/>
Q 26.8. Other spendings ( guide fees, shopping at grocery stores, etc )	<input type="text"/>	<input type="text"/>
Total Amount	<input type="text"/>	Number of Persons Covered <input type="text"/>

**Q27. If you have used any of the following facilities and services, how would you in general rate their standards? Would you say it was:**

- Excellent (1)  
Good (2)  
Adequate (3)  
Moderate (4)  
Poor (5)

Services from Local  
Tour Operator

Guide Services

Hotels

Shopping

Ger Camps

Availability of  
Handicraft Items

Restaurants

Quality of Handicraft  
Items

Local Ground Transport

Price Level of Tourism  
Services (Value for Money)

Domestic Air Transport

**Q28. Overall, how would you rate your stay in Mongolia?**

- ☐ Excellent ☐ Good  
☐ Adequate ☐ Moderate  
☐ Poor

**Q29. Did your stay fulfill your expectations?**

- ☐ Yes ☐ Partly ☐ No

**Q30. How likely is it that you will return to Mongolia for a holiday visit during the next 5 years?**

- ☐ Very Likely ☐ Likely  
☐ Uncertain ☐ Unlikely  
☐ Very Unlikely

**Q31. Would you recommend Mongolia for your friends and relatives for a holiday visit?**

- ☐ Yes ☐ Perhaps ☐ No

**Q32. During your stay in Mongolia, were you a target of crime?**

☐ Yes

☐ No

If yes, was this minor (pickpockets, aggressively hassled by drunks)  
or major (violent assault, robbery)

☐☐

If yes, where did this take place?

**Q33. What is your best memory/experience of Mongolia?**

**Q34. What is your worst memory/experience of Mongolia?**

**Q35. What could have made your trip better or more enjoyable?**



**Q36. What did you find surprising about Mongolia when comparing your preconceived ideas before arrival and your experiences?**

**Q37. Other than Mongolia, what other countries did you consider visiting this year?**

**Q38. Why did you choose Mongolia over these countries?**